

CareerTech Information Management System (CTIMS)

EDI Complete User Guidebook

IMD (Information Management Division)

*career***tech**

March 2022

Table of Contents

| | |
|--|-----|
| EDI Contacts | 1 |
| CTIMS Support..... | 1 |
| Approval Process Overview..... | 2 |
| Help and Troubleshooting..... | 4 |
| Logging into CTIMS..... | 5 |
| Worksheet Process | 7 |
| Worksheet Process Flow | 8 |
| Local Coordinator | 9 |
| State Regional Coordinator | 21 |
| EDI State Initiative Supervisor | 27 |
| Change Request Process | 28 |
| Agreement Process..... | 37 |
| Agreement Process Flow | 38 |
| Local Coordinator | 39 |
| Local BIS Director | 45 |
| State Regional Coordinator | 51 |
| State Initiative Supervisor | 57 |
| Local Superintendent/CEO (or Designee) | 58 |
| Local Finance Coordinator | 64 |
| Budget Adjustment Process | 70 |
| Invoice Process | 77 |
| Invoice Process Flow | 78 |
| Local Coordinator | 79 |
| Invoice Change Request | 96 |
| Local BIS Director | 99 |
| Local Finance Coordinator | 104 |
| State Regional Coordinator | 109 |

| | |
|---|-----|
| State Requisition Coordinator | 114 |
| Printing a PEF | 120 |
| Business Codes | 125 |
| CTIMS Helpful Hints | 136 |
| CTIMS Helpful Hints | 137 |
| Where's my Worksheet, Agreement or Invoice? | 138 |
| Releasing Unused Funds | 139 |

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IMPORTANT: For questions about specific EDI requirements or what content you need to input or attach with your worksheet, contact your ODCTE Regional Coordinator.

CTIMS Support

If you have questions about submitting information in CTIMS, please contact CTIMS Support at CTIMSSupport@careertech.ok.gov, or contact:

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Approval Process Overview

Worksheet Approval Stage (Stage 1)

| EDI Role | Process |
|-----------------------------|---|
| Local Coordinator | Initiate the Worksheet Approval process. Budget is added here along with company information. Upload the Excel spreadsheet, as well as supporting documents (i.e. 3 rd party vendor proposal). |
| State Regional Coordinator | Approve the budget and line items and confirm company information is entered completely. |
| State Initiative Supervisor | Approve the budget and line items. The Worksheet becomes fully approved. |

Agreement Approval Stage (Stage 2)

| EDI Role | Process |
|--|--|
| Local Coordinator | Initiate the Agreement approval process. (No changes should need to be made.) |
| Local BIS Director | Approve the Agreement |
| State Regional Coordinator | Approve the Agreement. The approval will generate a signature on the SOU. |
| State Initiative Supervisor | Approve the Agreement. The approval will generate a signature on the SOU. |
| Local Superintendent/CEO (or designee) | Approve the Agreement. The approval will generate a signature on the SOU. |
| State Requisition Coordinator | Generate the SOU, submit the requisition to finance, enter the PO number into the Agreement. |
| Local Finance Coordinator | Enter OCAS codes and add new codes as needed. The Agreement becomes fully approved. |

Budget Adjustment Approval Stage (if Agreement changes are necessary)

| EDI Role | Process |
|--|--|
| Local Coordinator | Initiate the Budget Adjustment process. Budget is adjusted and/or new line items added here. |
| Local BIS Director | Approve the Budget Adjustment. |
| State Regional Coordinator | Approve the Budget Adjustment. |
| State Initiative Supervisor | Approve the Budget Adjustment. |
| Local Superintendent/CEO (or designee) | Approve the Budget Adjustment. |
| State Requisition Coordinator | Verify the PO amount is still accurate. (if \$ increased, then request finance increase the PO amount) |
| Local Finance Coordinator | Verify OCAS codes and add new codes as needed. The Budget Adjustment becomes fully approved. |

Invoice Approval Stage (Stage 3)

| EDI Role | Process |
|-------------------------------|--|
| Local Coordinator | After training is complete, the EDI Local Coordinator initiates the invoice process. |
| Local BIS Director | Review and approve invoice line items and attachments. |
| Local Finance Coordinator | Review and approve invoice line items and attachments. |
| State Regional Coordinator | Review and approve invoice line items and attachments. |
| State Requisition Coordinator | Verify the invoices, print the documentation, and deliver to the finance department. |
| ODCTE EDI Finance Reviewer | Review and approve the invoice and documentation. The invoice becomes fully approved. Pay the claim. |



Help and Troubleshooting

If you do not have a CTIMS account set up or are having trouble with the navigation or software, contact CTIMSSupport@careertech.ok.gov. Send a message describing your problem. Include your school name and your telephone number and we will contact you.

If you have forgotten your password, click the **Forgot your password?** link to reset.

For helpful tips, see the [CTIMS Helpful Hints](#) section of this document.

IMPORTANT:

Please log into CTIMS using Internet Explorer  version 11 or higher or Microsoft Edge . CTIMS is currently not compatible with other browsers.

CTIMS Customer Support Contact

Rebecca Thacker

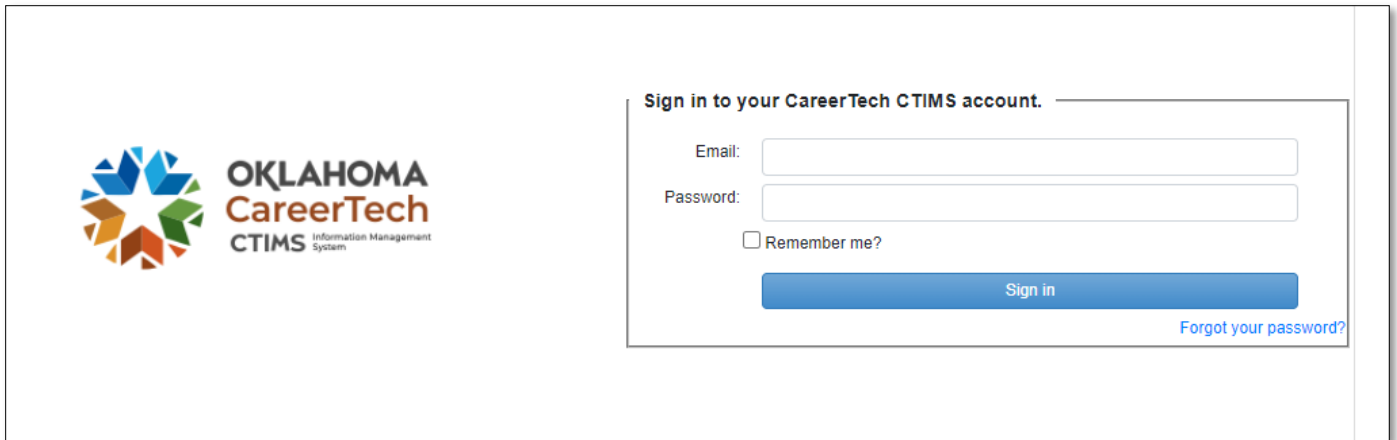
Phone: 405-743-5134

CTIMSSupport@careertech.ok.gov

Logging into CTIMS

Sign in using your school email and CTIMS password at

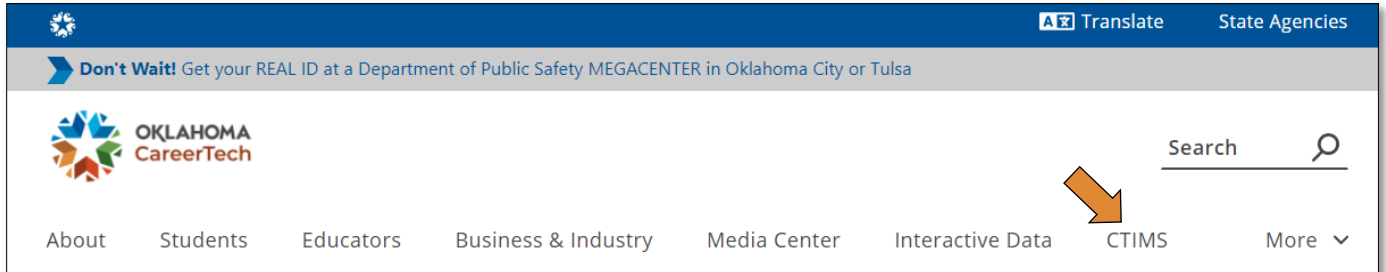
<https://ctims.okcareertech.org/CTBDSWeb>



The screenshot shows the login interface for the Oklahoma CareerTech CTIMS system. On the left is the logo, which consists of a colorful star-like icon made of geometric shapes and the text "OKLAHOMA CareerTech CTIMS Information Management System". On the right, there is a login box titled "Sign in to your CareerTech CTIMS account." containing fields for "Email:" and "Password:", a checkbox for "Remember me?", a blue "Sign in" button, and a link for "Forgot your password?".

Or,

Go to <http://www.okcareertech.org/> and select the CTIMS tab.






On the IMD website, select the green CTIMS Login button.

CTIMS (CareerTech Information Management System)

CTIMS Login and Assistance



• Click here to login to CTIMS:

- Microsoft Edge , Mozilla Firefox , or Google Chrome  are currently the only browsers compatible with CTIMS.
- [Setting up your CTIMS Account](#)
- For help with CTIMS, contact the Information Management Division via email: CTIMSSupport@careertech.ok.gov
- Support available Monday through Thursday 7:00 - 5:00 and Fridays 7:00 - 4:00

Worksheet Process

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Worksheet Process Flow

Roles: Worksheet Approval Process

The roles represent the stages required in CTIMS for the submission of a New Worksheet (Application).

Stage 1 - Local Coordinator – Creates, completes, saves and submits new worksheet. This starts the Worksheet approval process. The budget is added with the company information. The mandatory Excel spreadsheet is uploaded.



Stage 2 – State Regional Coordinator – 2nd Approval. Reviews and approves or rejects worksheet and line items, and confirms company information is entered completely. If approved, the worksheet goes to the EDI State Supervisor stage. If rejected, it goes back to stage 1.

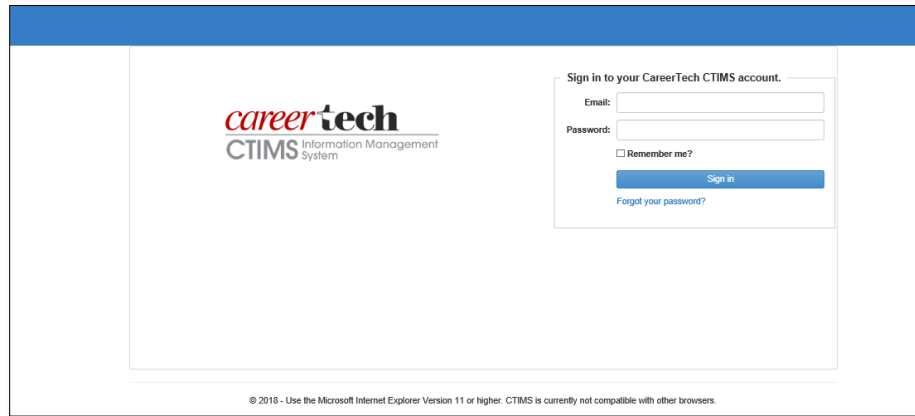




Stage 3 – State Initiative Supervisor - 3rd Approval. ODCTE state staff review and approve or reject the worksheet. If approved, this completes the Worksheet approval. If rejected, goes back to stage 1.

Local Coordinator

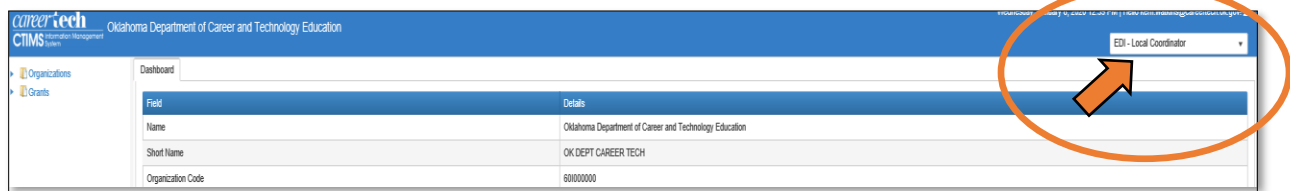
Starting a New Worksheet

- Sign in at <https://ctims.okcareertech.org/CTBDSWeb/> using your school email and CTIMS password.

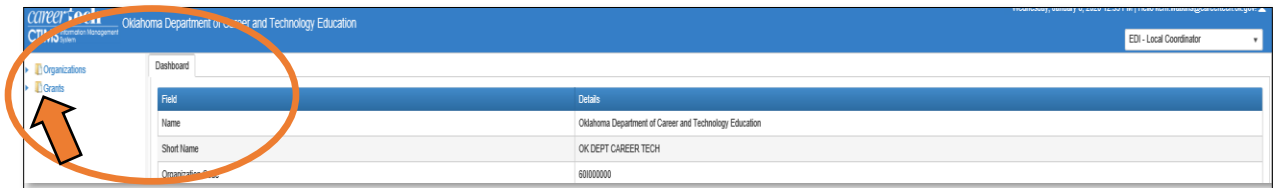


IMPORTANT: Please log into CTIMS using Internet Explorer  version 11 or higher or Microsoft Edge . CTIMS is currently not compatible with other browsers.

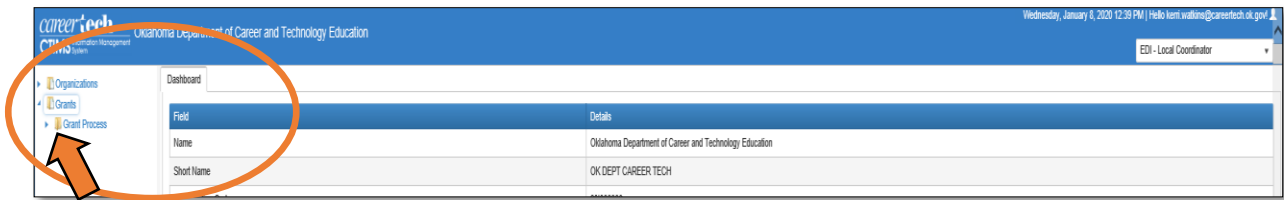
- Verify that you are signed in with the role of an **EDI Local Coordinator**. In the top right corner. Use the drop-down arrow to select this role.



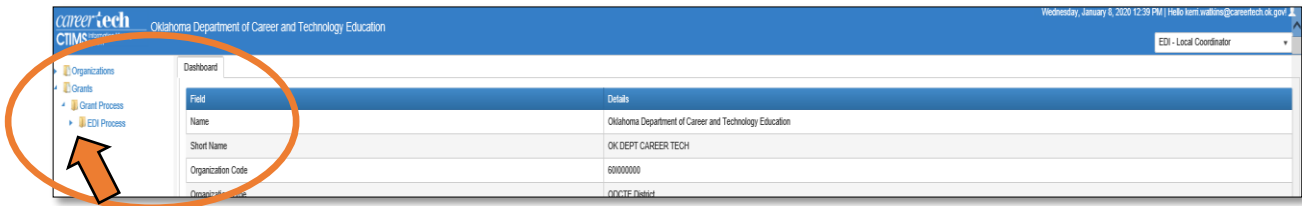
- Click the arrow |▶ next to **Grants** on left navigation.



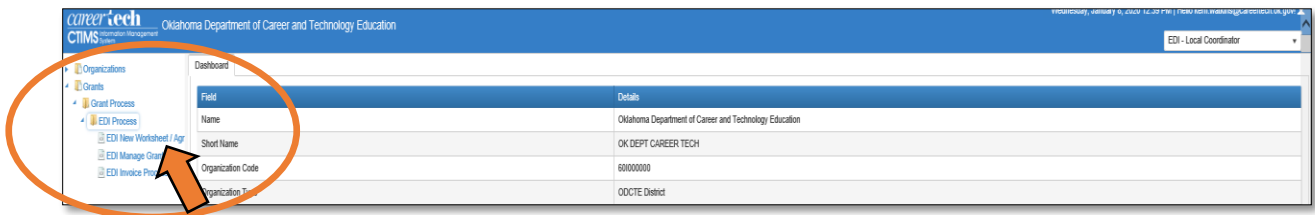
- Click the arrow |▶ next to **Grant Process** on left navigation.



- Click the arrow |▶ next to **EDI Process** on left navigation.



- Select **EDI New Worksheet/Agreement Flow**.



EDI Grant Submit Worksheet – Step 1

1.1 - Complete the **EDI Grant Submit Worksheet – Step 1** form. **The tagged numbers on the screenshot correspond to the instruction steps below.** Many of these fields will automatically display based on your organization login credentials.

1. **Fiscal Calendar Year***. This field automatically displays the current year. If you are applying for another year, change this field.
2. **Grant Fund Type*** automatically displays based on your organization login and role credentials. Should be EDI.
3. **Organization Type*** should be Tech Center Districts and will automatically display.
4. **Select an Organization *** by typing in the first three letters of your school or organization name.
5. Select an **Organization District*** if it does not automatically appear after typing the first three letters of your **Organization** name or if you need to select a different **Organization District**.
6. Select a **Program Initiative*** from the dropdown menu.
7. The **Worksheet No.*** automatically displays after selecting the **Program Initiative**.
8. **Organization Type*** will automatically display as Business Masters.
9. Select the appropriate **Client Type*** from the drop-down menu.
10. Select an **Organization** you are requesting training by typing in the first three letters of the organization name. * If this is a new organization, not in the Business Master, you will need to request a new business code by going to **Organizations>Business Master>Request New Business Code** (See the Business Master guidebook on the CTIMS page for complete instructions: <https://www.okcareertech.org/about/state-agency/divisions/imd/ctims/BusinessMasterGuidebook.pdf>).
11. The **Business Code*** is associated with the Organization and automatically displays after an **Organization** is selected. If the organization is not available on the drop-down menu, you will need to reactivate or request a new business code. To reactivate or request a new business code, refer to the Business Code section of this document found [here](#).
12. After verifying that all information is correct, Click **Save & Next** button.

NOTE: A red asterisk (*) on the form indicates a required field.

Dashboard | EDI New Worksheet / Agreement Flow X

EDI Grant Submit Worksheet - Step 1

Save & Next

| | | | | | |
|------------------------|-----|--|---------------------|-----|--|
| Fiscal Calendar Year* | 1 - | 2019-2020 | Grant Fund Type* | 2 - | EDI |
| Organization Type* | 3 - | Tech Center Districts | Organization* | 4 - | Sample Technology Center Center |
| Organization District* | 5 - | Sample Technology Center Center | Program Initiative* | 6 - | Economic Development - Firefighter (Type 83)-444 |
| Worksheet No.* | 7 - | WS-1920-EDI-FIREFTR-444-07X111745-8C7B794D1C12 | | | |

Client Basic Information For work Sheet

| | | | | | |
|--------------------|------|---------------------|----------------|------|-----------------------------|
| Organization Type* | 8 - | Business Masters | Client Type* | 9 - | Business Masters (Company) |
| Organization* | 10 - | Sample Organization | Business Code* | 11 - | 25093 |

View Location(s) View Contact(s)

| | | | |
|-----------------------------|--------------------------|---------------------------|---|
| Year Established | | FEI Number | |
| Primary NAICS Code | Fire Protection (922160) | Secondary NAICS Code | Agriculture, Forestry, Fishing and Hunting (11) |
| Years in Business | | Years in Oklahoma | |
| No. of hourly Employees | 0 | No. of Salaried Employees | 0 |
| Highest Level of Employment | | Client Products | |
| Approval Status | | Vendor Number | |
| Year Formed | | Year Joined | |
| Year Left | | Impact District Id | |
| Region | | DUNS Number | |

12 - Save & Next

IMPORTANT: You must select an organization under the **Basic Information for Work Sheet** section before the **Save & Next** button will be available. The information in the form below the Client Basic Information for Work Sheet section is not a fillable form. You do not need to complete any of this information.

EDI Grant Submit Worksheet – Step 2

2.1 - Verify the client information on the **EDI Grant Submit Worksheet – Step 2 Page**.

Expand the **Provider Organization Details** section by clicking on the **+(plus)** sign if it is not already visible.

Dashboard | EDI New Worksheet / Agreement Flow X

EDI Grant Submit Worksheet - Step 2

+ Provider Organization Details Refresh Worksheet Summary Save & Next

+ Basic Client Information

+ Funding Request Details

Refresh Worksheet Summary Save & Next

2.2 - Verify the **Basic Client Information**. Expand the **Basic Client Information** section by clicking on the **+(plus)** sign.

Dashboard | EDI New Worksheet / Agreement Flow X

EDI Grant Submit Worksheet - Step 2

Provider Organization Details Refresh Worksheet Summary Save & Next

Fiscal Calendar Year* 2019-2020 Grant Fund Type* EDI

Organization Type* Tech Center Districts Organization* Sample Technology Center Center

Organization* Sample Technology Center Center Program Initiative* Economic Development - Firefighter (Type 83) -444

Worksheet No* WS-1920-EDI-EDI-FIREFTR-444-07X11745-1519F08F645C

+ Basic Client Information Refresh Worksheet Summary Save & Next

+ Funding Request Details

2.3 – Expand the **Funding Request Details** section by clicking on the **+(plus)** sign.

Dashboard | EDI New Worksheet / Agreement Flow X

EDI Grant Submit Worksheet - Step 2

+ Provider Organization Details Refresh Worksheet Summary Save & Next

+ Basic Client Information

Organization Type* Business Masters Client Type* Business Masters (Company)

Organization* Sample Organization Business Code* 25093 DUNS

+ Funding Request Details Refresh Worksheet Summary Save & Next

2.4 – Scroll down to access and complete all the sections. You must put something in every box with a red asterisk (*). This form is different for each initiative. After you complete the form, click the **Worksheet Summary** button to print a pdf of your worksheet

2.5 – Click the **Save & Next** button at the top or bottom of the form.

NOTE: You can click the **Worksheet Summary** button at the top or bottom of the form to view the Worksheet details before going to the next step.

IMPORTANT: You must finish the **EDI Grant Submit Worksheet – Step 2** page and click **Save and Next** for any of the information to be saved.

FORM EXAMPLES:

TIP & TIG Worksheet:

The screenshot shows a web application interface for the 'EDI Grant Submit Worksheet - Step 2'. The left sidebar contains a navigation menu with items: 'Grant Process', 'EDI Process', 'EDI New Worksheet / Agreement Flow' (highlighted), 'EDI Manage Grant WorkS...', and 'EDI Invoice Process'. The main content area has a blue header bar with the title 'EDI Grant Submit Worksheet - Step 2' and buttons for 'Refresh', 'Worksheet Summary', and 'Save & Next'. Below the header, there are expandable sections: '+ Provider Organization Details', '+ Basic Client Information', '+ Attachments', and '- Funding Request Details'. The 'New TIP Worksheet' section is active, displaying a list of input fields: 'Client Name*', 'Client's Mailing Address*', 'CEO's Name', 'CEO's Phone', 'CEO's Email Address', 'Contact's Name*', 'Contact's Title*', 'Contact's Phone Number*', 'Contact's Email Address*', 'Client's Product', 'Years in Business*', and 'Years in Oklahoma*'. Each field is represented by a text input box.

Firefighter Training Worksheet:

This screenshot shows the same 'EDI Grant Submit Worksheet - Step 2' interface, but with the 'New FFT Worksheet' section active. The input fields are: 'Fire Station Name*', 'Fire Station Mailing Address*', 'Chiefs Name*', 'Chiefs Phone*', 'Chiefs Email Address*', 'Contact's Name*', 'Contact's Title*', 'Contact's Phone Number*', 'Contact's Email Address*', 'Contract Start Date*' (with a calendar icon), 'Current Employees*', and 'Number Of Trainees*'. The footer of the page contains the text: '© 2016 - Production Site. Please log in using Microsoft Explorer version 11 or higher. CTIMS is currently not compatible with other browsers. | Version: 1.0 | CTBDS'.

New Safety Worksheet:

ants

Grant Process

EDI Process

EDI New Worksheet / Agr

EDI Manage Grant WorkS

EDI Invoice Process

Dashboard | EDI New Worksheet / Agreement Flow

EDI Grant Submit Worksheet - Step 2

Refresh | Worksheet Summary | Save & Next

Provider Organization Details

Basic Client Information

Attachments

Funding Request Details

New Safety Worksheet

Contact's Name*

Contact's Title*

Contact's Phone Number*

Contact's Email Address*

Contract Start Date*

Current Employees

Number Of Trainees

Why is training being requested?

Maintain

Upgrade

What type of training is being requested?

Economic Development – Incubator Worksheet:

its

Grant Process

EDI Process

EDI New Worksheet / Agr

EDI Manage Grant WorkS

EDI Invoice Process

Dashboard | EDI New Worksheet / Agreement Flow

EDI Grant Submit Worksheet - Step 2

Refresh | Worksheet Summary | Save & Next

Provider Organization Details

Basic Client Information

Attachments

Funding Request Details

New Incubator Worksheet

Contact's Name*

Contact's Title*

Contact's Phone Number*

Contact's Email Address*

Contract Start Date*

Current Employees*

Number Of Trainees*

Why is training being requested?

Maintain

Upgrade

What type of training is being requested?

EDI Grant Submit Worksheet – Step 3

3.1 - On the **EDI Grant Submit Worksheet – Step 3 Page**, click on the **+(plus)** sign next to **Budget Line Items** to expand this section of the form if it is not automatically expanded. On the **Budget Line Items** screen, you can click the **Add Budget Line**, **Remove Budget Line**, or **Cancel Budget Line Changes**. The first line automatically comes up, so you can start typing in the budget item. Just click in the blank box under the column titles to begin.

1. Complete **Budget Line Desc** with the description of the item.
2. Complete **Req. Units** (Required Units-Zero (0) is not acceptable in this field).
3. Complete **Req. Unit Cost** (Required Unit Cost-Zero (0) is not acceptable in this field).
4. Complete **Req Unit Type** (Required Unit Type)-Select **Req Unit Type** from the drop-down menu.
5. If your school will match any of the funds, enter that amount under **Matched Funds**.
6. Click **Add Budget Line**, to add more budget lines and repeat steps 1-5. (You may need to scroll to the right to see all columns).

Dashboard | EDI New Worksheet / Agreement Flow X

EDI Grant Submit Worksheet - Step 3

+ Provider Organization Details Refresh Worksheet Summary One Step Back Save as Draft Submit For Approval

+ Basic Client Information

+ Project Details

- Budget Line Items

Grant Allocation

| | | | | | | |
|----------------------|--------------------|---------------------------|--------------------|-------------------------|--|----------------------|
| Sub Award Allocation | Worksheet Budgeted | Worksheet Requested Total | Agreement Budgeted | Fully Approved Invoiced | Agreement Unbudgeted = (Allocated - Agrmt. Budgeted) | Remaining to Invoice |
| \$63,038.00 | \$25,683.51 | \$25,683.51 | \$11,015.21 | \$0.00 | \$52,022.79 | \$11,015.21 |

+ Add Budget Line X Remove Budget Line Cancel Budget Line Changes

| Budget Line Desc. | Req. Units | Req. Unit Cost | Req. Unit Type | Work Sheet Total | Req. Total | Matched Funds | Status |
|-------------------|------------|----------------|----------------|------------------|------------|---------------|-------------|
| | 0.00 | \$0.00 | | \$0.00 | \$0.00 | | 0.00 Active |

3.2 - Type a **Note** in the space below the line item budget area if needed.

Budget Line Items

Grant Allocation: Sub Award Allocation \$63,038.00 Worksheet Budgeted \$25,683.51 Worksheet Requested Total \$25,683.51 Agreement Budgeted \$11,015.21 Fully Approved Invoiced \$0.00 Agreement Unbudgeted - (Allocated - Agmt. Budgeted) \$52,022.79 Remaining to Invoice \$11,015.21

+ Add Budget Line X Remove Budget Line Cancel Budget Line Changes

| Budget Line Desc. | Req. Units | Req. Unit Cost | Req. Unit Type | Work Sheet Total | Req. Total | Matched Funds | Status |
|-------------------|------------|----------------|----------------|------------------|------------|---------------|--------|
| Sample | 1.00 | \$1.00 | Cost Per Class | \$1.00 | \$1.00 | 0.00 | Active |

Note
Maximum 1000 characters length

3.3 - Add supporting or required attachments. Expand the **Attachments** section by clicking the **+(plus)** sign. Then, click **Browse**, and find your document. Finally, select **Upload & Save file**.

NOTE: If you do not have your attachment file prepared at this time, you can click **Save as Draft** and return later to complete the Worksheet process.

Attachments

Browse... Upload & Save file

Attachment Note:

Active/Inactive File(s) Delete File(s) Download all files

| Status | File Name | Attachment Note | Uploaded Date | Action |
|--------|-----------|-----------------|---------------|--------|
|--------|-----------|-----------------|---------------|--------|

+ Acknowledgements

Refresh Worksheet Summary One Step Back Save as Draft Submit For Approval

3.4 - You can add a note for the attachment after it has been uploaded by clicking the field for **Attachment Note**.

To save as Draft

You can **Save as Draft** at this point and it will save all information you have input on the **Funding Request Details** form and the **Budget Line Items** section without submitting for approval. This will let you stop the process and resume at a later time. You can make any changes you need to the **Funding Request Details** or the **Budget Line Items** before you submit by selecting the line and making the changes.

EDI Grant Submit Worksheet - Acknowledgements

4.1 - Click the **+(plus)** sign next to the **Acknowledgements** section and check the acknowledgement certification buttons, then add an **Acknowledgement Note**. This is required, but you can add your initials if you do not have a note to add.

Oklahoma Department of Career and Technology Education

Dashboard | EDI Manage Grant Worksheets/Agreements/Invoices/Follow-up | WS-1617-ED-ED-FIREFTR-444-16X11745-49C54AE537E8 - New

EDI Local BIS Coordinator

EDI Grant Submit Worksheet - Step 4

Provider Organization Details

Basic Client Information

Budget Line Items

Acknowledgements

☐ By checking this box, I certify that the information provided is accurate and complete.

Acknowledgement Note:

Add note here. If you do not have a note to add, type your initials. This field is required.

Refresh | Worksheet Summary | One Step Back | Save as Draft | Submit For Approval

NOTE: To ensure your worksheet is complete and accurate, you can view or print your worksheet summary page before submitting for approval. Click on the **Worksheet Summary** button at the top or bottom of the form. Be sure to **Save as Draft** before viewing the **Worksheet Summary**.

Dashboard | EDI New Worksheet / Agreement Flow

EDI Grant Submit Worksheet - Step 3

Provider Organization Details

Basic Client Information

Project Details

Budget Line Items

Attachments



Acknowledgements

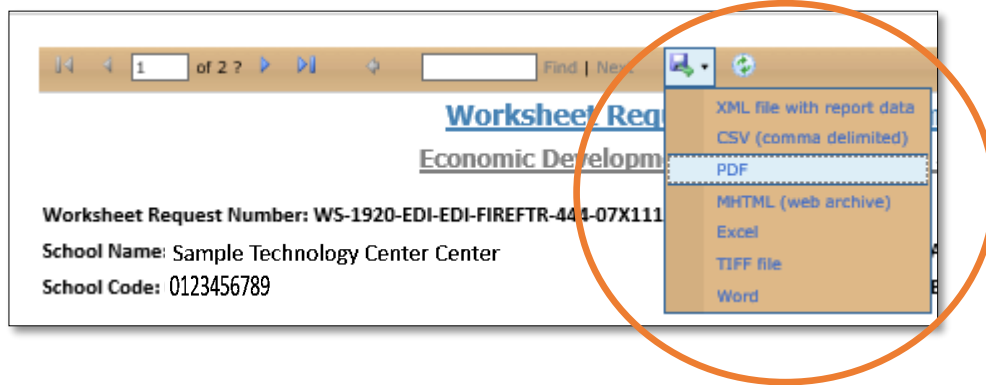
☒ By checking this box, I certify that the information provided is accurate and complete.

Acknowledgement Note:

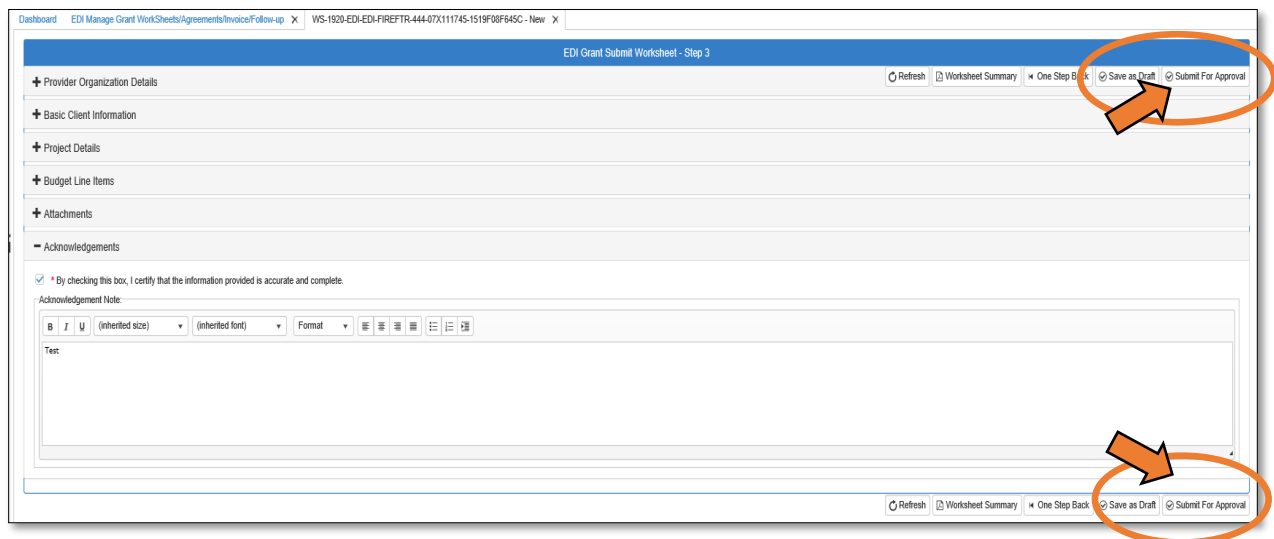
Text

Refresh | Worksheet Summary | One Step Back | Save as Draft | Submit For Approval

- To print the **Worksheet Summary**, click the save icon  and choose Excel or PDF from the drop-down menu to download a document that you can save or print. To return to the EDI Grant Submit Worksheet – Step 3 form to submit for approval, click the  on the Grant Worksheet Summary tab at the top of your screen.



4.2 – On the **EDI Grant Submit Worksheet – Step 3** form, click the **Submit for Approval** button at the top or bottom of the form.


 A screenshot of the 'EDI Grant Submit Worksheet - Step 3' form. The form has a blue header bar with the title 'EDI Grant Submit Worksheet - Step 3'. Below the header, there are several sections: 'Provider Organization Details', 'Basic Client Information', 'Project Details', 'Budget Line Items', 'Attachments', and 'Acknowledgements'. The 'Acknowledgements' section is expanded, showing a checkbox labeled 'By checking this box, I certify that the information provided is accurate and complete.' and a text area for an 'Acknowledgement Note'. At the bottom of the form, there is a navigation bar with buttons: 'Refresh', 'Worksheet Summary', 'One Step Back', 'Save as Draft', and 'Submit For Approval'. Two orange arrows point to the 'Submit For Approval' button, one at the top right and one at the bottom right.

Your worksheet has been successfully submitted. You will receive an email from the CTIMS stating your worksheet has been submitted successfully to the EDI State Regional Coordinator.


If Change Request is needed: After you submit the worksheet/application, if there are any changes needed due to change in training need or it has been rejected, you will have to use the **Change Request** process. The Local Coordinator can initiate the change request process at any time before it is fully approved by the ODCTE staff. You can find complete instructions on [here](#).

IMPORTANT: If you do need to do a **Change Request**, do not select the EDI New Worksheet/Agreement Flow option on the left navigation. This will start a completely new worksheet.

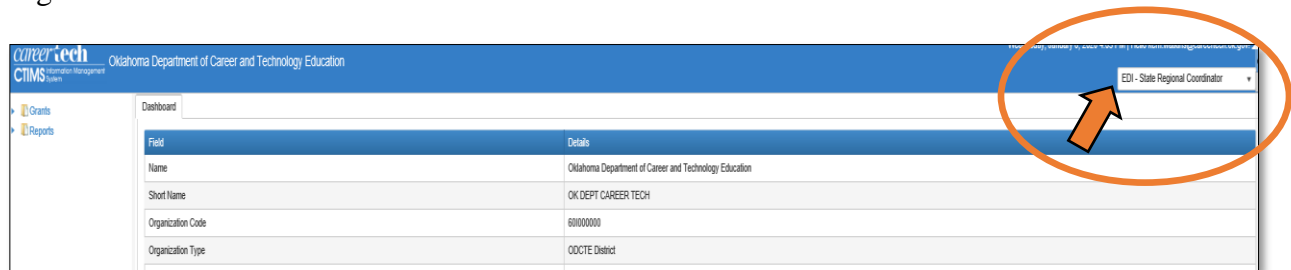
State Regional Coordinator

After the **Local Coordinator** has created and submitted the worksheet, the **State Regional Coordinator** will receive an email to review the worksheet and budget to approve or reject.

Signing in & Opening the Worksheet

IMPORTANT: Please log into CTIMS using **Internet Explorer**  **version 11 or higher** or **Microsoft Edge** . CTIMS is currently not compatible with other browsers.

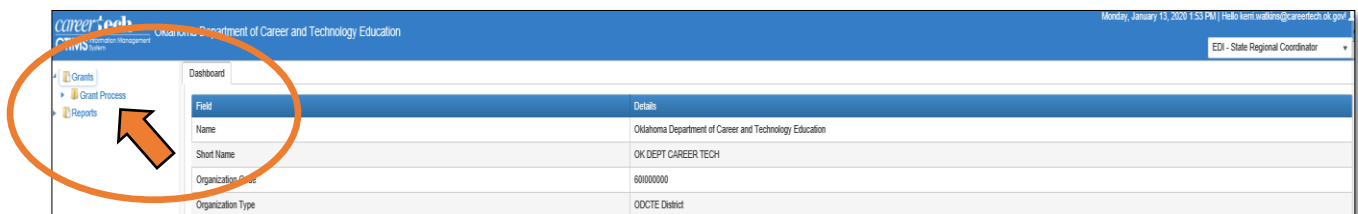
Verify that you are signed in with the role of an **EDI State Regional Coordinator** in the top right-hand corner.



- Click the arrow | ► next to **Grants** on left navigation.



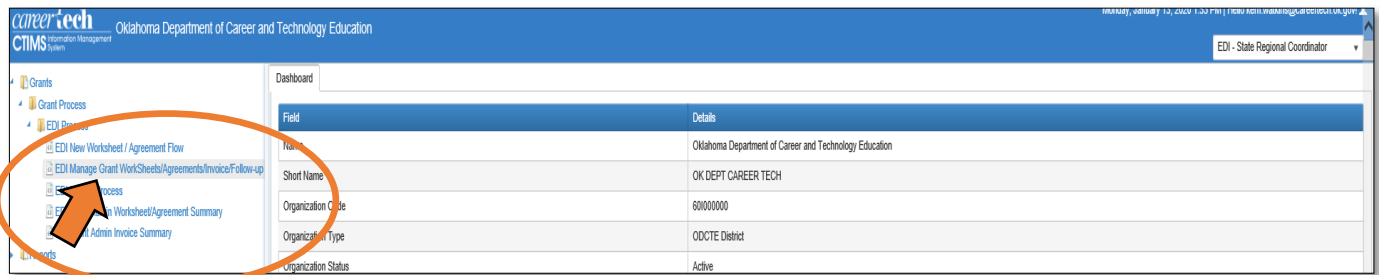
- Click the arrow | ► next to **Grants Process**



- Click the arrow  next to **EDI Process**

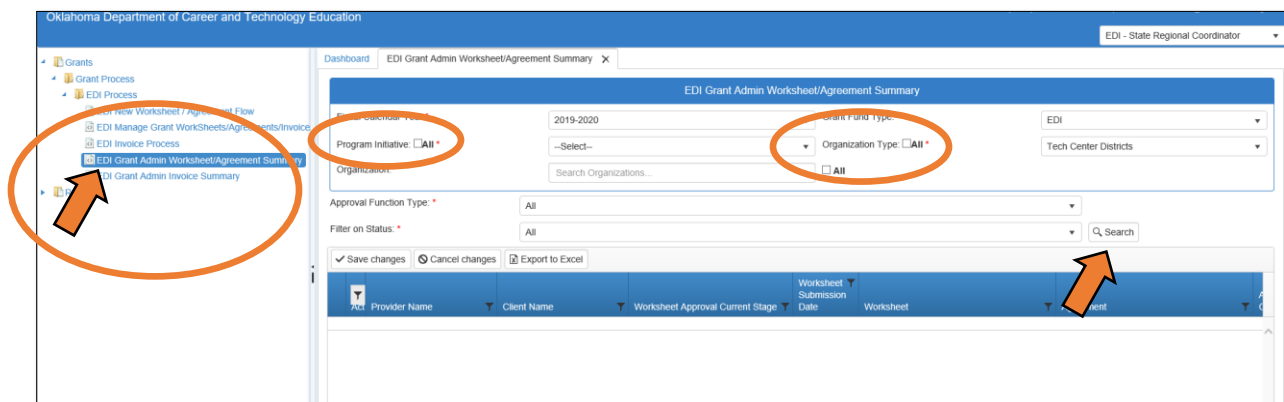


- Select **EDI Manage Grant Worksheets/Agreements/Invoice/Follow-up** to approve individual schools.



Or,

- Select **EDI Grant Admin Worksheet/Agreement Summary** to list all pending requests. Check the **ALL** boxes on **Program Initiative**, **Organization Type**, and **Organization** to list all the requests for all schools. Click **Search** to display all in the display screen.



If you are selecting individual schools, complete the **EDI Grant Fund Worksheets List** form. The tagged numbers on the screenshot correspond to the instruction steps below.

NOTE: The red asterisks* represents a required field.

1. Verify **Fiscal Calendar Year***.
2. Verify **Grant Fund Type** is set to **EDI***.
3. Select your correct **Organization Type** from the drop-down menu. This should default to Tech Center Districts.
4. Select your **Organization** by typing in the first three characters of the technology center name.
5. Verify the **Organization District***.
6. Select a **Program Initiative*** using the drop-down menu.
7. **Approval Function Type** will remain as **All**.
8. **Filter on Status** will remain as **All**.
9. Select the **Search** button to search for any outstanding worksheets/applications that need your approval.

NOTE: A red asterisk (*) indicates a required field.

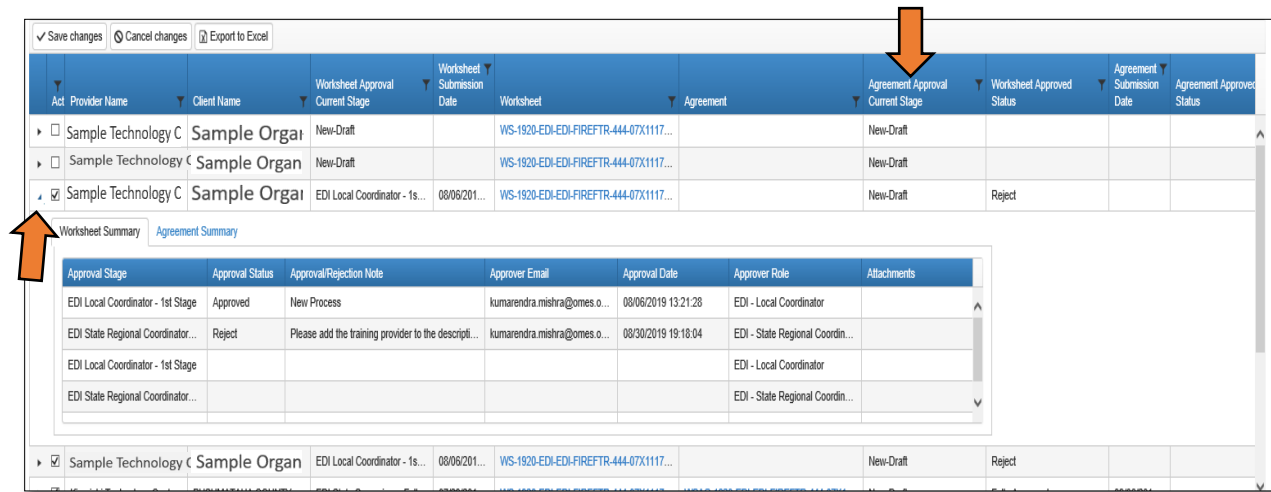
The screenshot shows the 'EDI Grant Fund Worksheets List' form. It includes several dropdown menus and a search button, each with a red number indicating a step in the process:

- 1** - Fiscal Calendar Year* (dropdown set to 2019-2020)
- 2** - Grant Fund Type* (dropdown set to EDI)
- 3** - Organization Type* (dropdown set to Tech Center Districts)
- 4** - Organization* (text input with 'Sample Technology Center Center' and a clear button)
- 5** - Organization District* (dropdown set to Sample Technology Center Center)
- 6** - Program Initiative* (dropdown set to Economic Development - Firefighter (Type 83) -444)
- 7** - Approval Function Type* (dropdown set to All)
- 8** - Filter on Status* (dropdown set to All)
- 9** - Search button

Below the form are buttons for 'Save changes', 'Cancel changes', and 'Export to Excel'. At the bottom, there is a table header with columns for Act, Provider Name, Client Name, Worksheet Approval, Submission, Worksheet, Agreement, Agreement Approval, Worksheet Approved, Submission, and Agreement Approved.

The **EDI Grant Fund Worksheets List** will open and the worksheets/applications that needs to be approved will be listed.

NOTE: You can click the arrow ► in the first column to open the worksheet summary of the Approval Stages for each worksheet. The **Worksheet Approval Current Stage** column will show the current role that needs to take action on the worksheet.

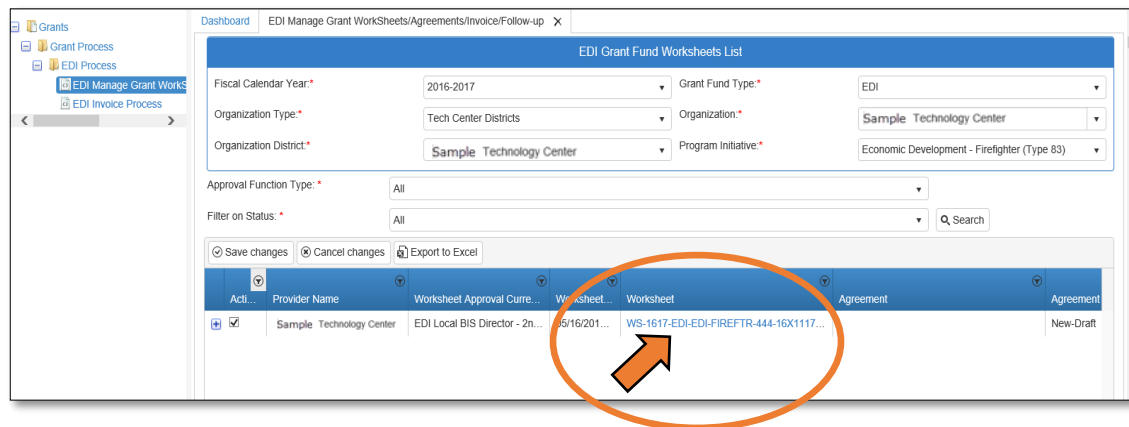


| Act | Provider Name | Client Name | Worksheet Approval Current Stage | Worksheet Submission Date | Worksheet | Agreement | Agreement Approval Current Stage | Worksheet Approved Status | Agreement Submission Date | Agreement Approved Status |
|-----|---------------------|--------------|----------------------------------|---------------------------|--|-----------|----------------------------------|---------------------------|---------------------------|---------------------------|
| ► | Sample Technology C | Sample Orga | New-Draft | | WS-1920-EDI-EDI-FIREFTR-444-07X1117... | | New-Draft | | | |
| ► | Sample Technology C | Sample Organ | New-Draft | | WS-1920-EDI-EDI-FIREFTR-444-07X1117... | | New-Draft | | | |
| ► | Sample Technology C | Sample Orga | EDI Local Coordinator - 1s... | 08/06/201... | WS-1920-EDI-EDI-FIREFTR-444-07X1117... | | New-Draft | Reject | | |

| Approval Stage | Approval Status | Approval/Rejection Note | Approver Email | Approval Date | Approver Role | Attachments |
|-----------------------------------|-----------------|---|-----------------------------|---------------------|---------------------------------|-------------|
| EDI Local Coordinator - 1st Stage | Approved | New Process | kumarendra.mishra@omes.o... | 08/06/2019 13:21:28 | EDI - Local Coordinator | |
| EDI State Regional Coordinator... | Reject | Please add the training provider to the descri... | kumarendra.mishra@omes.o... | 08/30/2019 19:18:04 | EDI - State Regional Coordin... | |
| EDI Local Coordinator - 1st Stage | | | | | EDI - Local Coordinator | |
| EDI State Regional Coordinator... | | | | | EDI - State Regional Coordin... | |

EDI Grant Fund Worksheet List

1.1 - Select the blue worksheet number under the **Worksheet** column on the **EDI Grant Fund Worksheet List** screen to open the worksheet (or on the EDI Grant Admin Worksheet/Agreement Summary Screen if you are selecting from the list of all of your schools).



Dashboard | EDI Manage Grant Worksheets/Agreements/Invoice/Follow-up

EDI Grant Fund Worksheets List

Fiscal Calendar Year: 2016-2017 | Grant Fund Type: EDI

Organization Type: Tech Center Districts | Organization: Sample Technology Center

Organization District: Sample Technology Center | Program Initiative: Economic Development - Firefighter (Type 83)

Approval Function Type: All | Filter on Status: All | Search

Save changes | Cancel changes | Export to Excel

| Act... | Provider Name | Worksheet Approval Curre... | Worksheet... | Worksheet | Agreement | Agreement |
|--------|--------------------------|--------------------------------|--------------|--|-----------|-----------|
| ► | Sample Technology Center | EDI Local BIS Director - 2n... | 5/16/201... | WS-1617-EDI-EDI-FIREFTR-444-16X1117... | | New-Draft |

EDI Grant Submit Worksheet

2.1 – Click the + (plus) signs next to **Basic Client Information** and **Funding Request Details** to expand these sections if you want to review the information.

EDI Grant Submit Worksheet - Step 2

Refresh Worksheet Summary Next Step

+ Provider Organization Details

+ Basic Client Information

- Funding Request Details

New FFT Worksheet

Fire Station Name* Valley View Volunteer Fire

Fire Station Mailing Address* 6704 NE Cache Rd

Chief's Name* Lin Newton

Chief's Phone* 580-351-7597

2.2 – Select **Next Step** to proceed.

Dashboard EDI Manage Grant Worksheets/Agreements/Invoice/Follow-up WS-1617-EDI-EDIFREFTR-444-16X111745-88953194C6A2 - 1st Stage

EDI Grant Submit Worksheet - Step 2

Refresh Worksheet Summary Next Step


+ Provider Organization Details

+ Basic Client Information

+ Attachments

+ Funding Request Details

Refresh Worksheet Summary Change Request Next Step

NOTE: We recommend you print a pdf of the **Worksheet Summary** before going to the next step to help with project and budget verification. Click on the **Worksheet Summary** button on the top right of the screen. Then click the save icon  to export to a pdf.

EDI Grant Submit Worksheet - Step 3

Refresh Worksheet Summary One Step Lock Save as Draft Submit For Approval Change Request

+ Provider Organization Details

+ Basic Client Information

+ Project Details

- Budget Line Items

Grant Allocation

| Sub Award Allocation | Worksheet Budgeted | Worksheet Requested Total | Agreement Budgeted | Fully Approved Invoiced | Agreement Unbudgeted = (Allocated - Agmt. Budgeted) | Remaining to Invoice |
|----------------------|--------------------|---------------------------|--------------------|-------------------------|---|----------------------|
| \$63,038.00 | \$25,684.51 | \$25,684.51 | \$11,015.21 | \$0.00 | \$52,022.79 | \$11,015.21 |

+ Add Budget Line X Remove Budget Line Cancel Budget Line Changes

| Budget Line Desc. | Req. Units | Req. Unit Cost | Req. Unit Type | Work Sheet Total | Req. Total | Matched Funds | Status |
|-------------------|------------|----------------|----------------|------------------|------------|---------------|--------|
| Test | 1.00 | \$1.00 | Cost Per Each | \$1.00 | \$1.00 | 0.00 | Active |

EDI Grant Submit Worksheet – Budget Line Items

3.1 – Verify the **Budget Line Items**. If everything is correct, select **Approval Process** at bottom of page.

| Budget Line (OCAS CODE) | Program - Function - Object | Budget Line Desc | Req. Units | Req. Unit Cost | Req. Unit Type | Work Sheet Total | Req. Total | Matched |
|-------------------------|-----------------------------|-----------------------|------------|----------------|----------------|------------------|------------|---------|
| | | Firefighter Workbooks | 10.00 | \$15.00 | Cost Per Each | \$150.00 | \$0.00 | |
| | | Tech Supplies | 10.00 | \$250.00 | Cost Per Each | \$2,500.00 | \$0.00 | |
| | | | | | | \$2,650.00 | \$0.00 | |

Note

Attachments

Acknowledgements

Refresh Worksheet Summary One Step Back Save as Draft Submit For Approval Change Request Approval Process

Approval Process - EDI Grant Worksheet Approval

- You are able to put an Approval or Rejection Note in at this step. The private note is for agency use only. When you have verified the worksheet and budget, hit the **Approve** button to send the worksheet to the next approval stage.

Approval/Rejection Note

Format

Add note here.

Private Note

Format

Add note here.

View to Public

Browse

Select files...

Attachment Note

| Approval Stage | File Name | Uploaded On | Note | Attachment |
|----------------|-----------|-------------|------|------------|
| | | | | |

Approve

At this point, your worksheet/application is successfully submitted. You will receive an email from the CTIMS system stating your worksheet/application has been submitted successfully to the EDI State Supervisor.

EDI State Initiative Supervisor

See instructions for Regional Coordinator [here](#)

Change Request Process

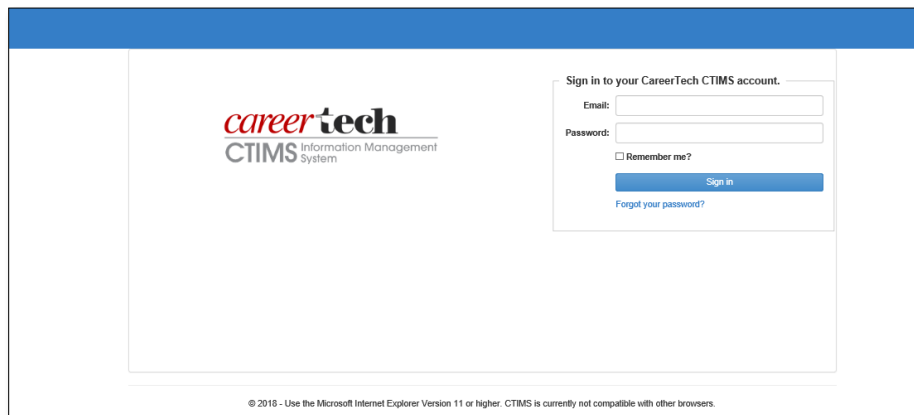
*career***tech**

Change Request Process

Logging in and Accessing the Worksheet

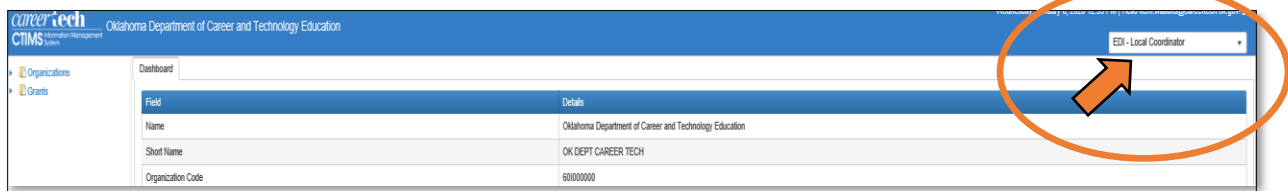
After a **Worksheet** is submitted for approval, you must go through the **Change Request Process** to make any changes. The **Local Coordinator**, **State Regional Coordinator**, and **State Supervisor** can initiate the change request at any time during the **Worksheet** process. However, once the **Worksheet** is fully approved, a change request is no longer an option.

- Sign in at <https://ctims.okcareertech.org/CTBDSWeb/> using your school email and CTIMS password.



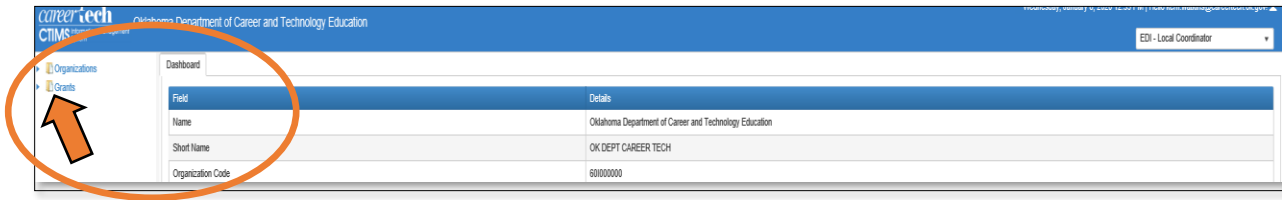
IMPORTANT: Please log into CTIMS using **Internet Explorer**  **version 11 or higher** or **Microsoft Edge** . CTIMS is currently not compatible with other browsers.

- Verify that you are signed in with the role of an **EDI Local Coordinator**, **State Regional Coordinator**, or **State Supervisor**. In the top right corner. Use the drop-down arrow to select your role.



| Field | Details |
|-------------------|--|
| Name | Oklahoma Department of Career and Technology Education |
| Short Name | OK DEPT CAREER TECH |
| Organization Code | 600000000 |

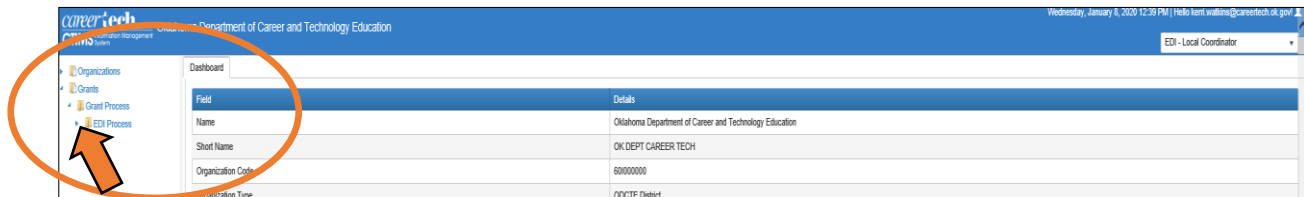
- Click the arrow ► next to **Grants** on left navigation.



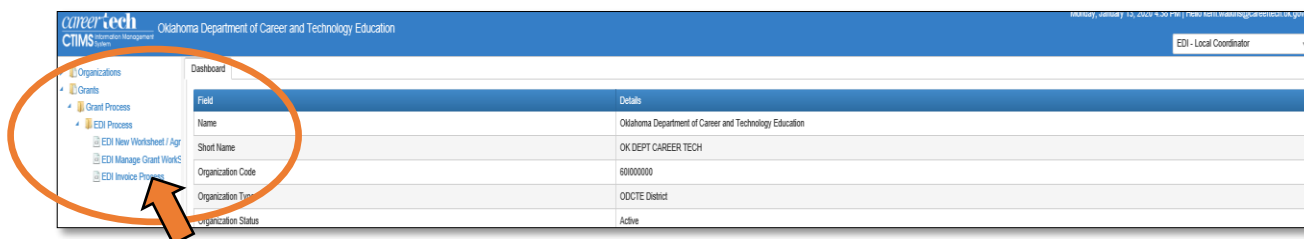
- Click the arrow ► next to **Grant Process** on left navigation.



- Click the arrow ► next to **EDI Process** on left navigation.



- Select **EDI Manage Grant Worksheets/Agreements/Invoice/Follow-UP**



IMPORTANT: Do not select the EDI New Worksheet/Agreement Flow option on the left navigation. This will start a completely new worksheet.

1. Verify **Fiscal Calendar Year*** to make sure the correct year is showing.
2. Verify **Grant Fund Type*** is set to EDI.
3. Select your correct **Organization Type** from the drop-down menu.
4. Select your **Organization*** by typing in the first three characters of the name.
5. Verify the **Organization District*** if it does not automatically appear after typing the first three letters of your Organization name or if you need to select a different Organization District.
6. Select the **Program Initiative***.
7. **Approval Function Type** will remain as **All**.
8. **Filter on Status** will remain as **All**.
9. Select the **Search** button to search the worksheet/application that needs changed.

NOTE: A red asterisk (*) indicates a required field.

Dashboard | EDI Manage Grant Worksheets/Agreements/Invoice/Follow-up X

EDI Grant Fund Worksheets List

| | | | |
|-------------------------|---------------------------|----------------------|--|
| Fiscal Calendar Year:* | 1 - 2019-2020 | Grant Fund Type:* | 2 - EDI |
| Organization Type:* | 3 - Tech Center Districts | Organization:* | 4 - Enter the first three characters of any word that is included in your organization |
| Organization District:* | 5 - | Program Initiative:* | 6 - --Select-- |

Approval Function Type: * 7 - All

Filter on Status: * 8 - All - 9

☒ Save changes
 ☐ Cancel changes

| Act | Provider Name | Client Name | Worksheet Approval Current Stage | Worksheet Submission Date | Worksheet | Agreement | Agreement Approval Current Stage | Worksheet Approved Status | Agreement Submission Date | Agreement / Status |
|-----|---------------|-------------|-------------------------------------|---------------------------------|-----------|-----------|-------------------------------------|------------------------------|---------------------------------|-----------------------|
| | | | | | | | | | | |

Initiating and Completing the Change Request

1.1 - After clicking the **Search** button, the worksheet/applications that are in the approval process will be listed. Select the worksheet number to open it.

oma Department of Career and Technology Education

EDI - Local BIS Director

Dashboard | EDI Manage Grant Worksheets/Agreements/Invoice/Follow-up

EDI Grant Fund Worksheets List

Fiscal Calendar Year: 2016-2017 Grant Fund Type: EDI

Organization Type: Tech Center Districts Organization: Test Technology Center

Organization District: Test Technology Center Program Initiative: Economic Development - Firefighter (Type 83)

Approval Function Type: All

Filter on Status: All

Save changes Cancel changes Export to Excel

| Act... | Provider Name | Worksheet Approval Curre... | Worksheet... | Worksheet | Agreement | Agreement |
|-------------------------------------|------------------------|--------------------------------|--------------|--|-----------|-----------|
| <input checked="" type="checkbox"/> | Test Technology Center | EDI Local BIS Director - Zn... | 5/16/201... | WS-1617-EDI-EDI-FIREFTR-444-16X1117... | | New-Draft |

1.2 - To make changes to your Worksheet/Application or Budget, select **Change Request**.

Department of Career and Technology Education

Monday, June 26, 2017 3:58 PM | Hello Denise Christy@careertech.ok.gov

EDI - Local BIS Coordinator

EDI Grant Submit Worksheet - Step 3

Provider Organization Details Refresh Worksheet Summary One Step Back Save as Draft Submit For Approval Change Request

Basic Client Information

Project Details

Budget Line Items

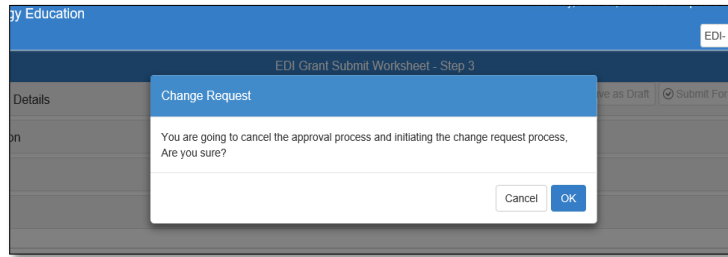
Grant Allocation

| Sub Award Allocation | Worksheet Budgeted | Agreement Budgeted | Fully Approved Invoiced | Agreement Unbudgeted = (Allocated - Agrmt. Budgeted) | Remaining to Invoice |
|----------------------|--------------------|--------------------|-------------------------|--|----------------------|
| \$2,007.20 | \$550.00 | \$0.00 | \$0.00 | \$2,007.20 | \$0.00 |

Add Budget Line Remove Budget Line Cancel Budget Line Changes

| Budget Line(OCAS CODE) | Program - Function - Object | Budget Line Desc | Req. Units | Req. Unit Cost | Req. Unit Type | Work Sheet Total | Req. Total | Matched |
|------------------------|-----------------------------|------------------|------------|----------------|----------------|------------------|------------|---------|
| | | Training | 3.00 | \$100.00 | Cost Per Class | \$300.00 | \$0.00 | |
| | | Books | 10.00 | \$10.00 | Cost Per Each | \$100.00 | \$0.00 | |
| | | supplies | 150.00 | \$1.00 | Cost Per Class | \$150.00 | \$0.00 | |

1.3 - The Change Request process will cancel the worksheet/application approval process. Click **OK** to continue.



1.4 – On the **EDI Grant Submit Worksheet-Step 2** screen, click **Save & Next**.

1.5 - Expand the **Project Details** section by clicking on the + (plus) sign if changes to the **Operating Unit** or **Purchase Order Number** need to be revised.

1.6 - Expand the **Budget Line Items** section by clicking on the + (plus) sign to revise the budget.

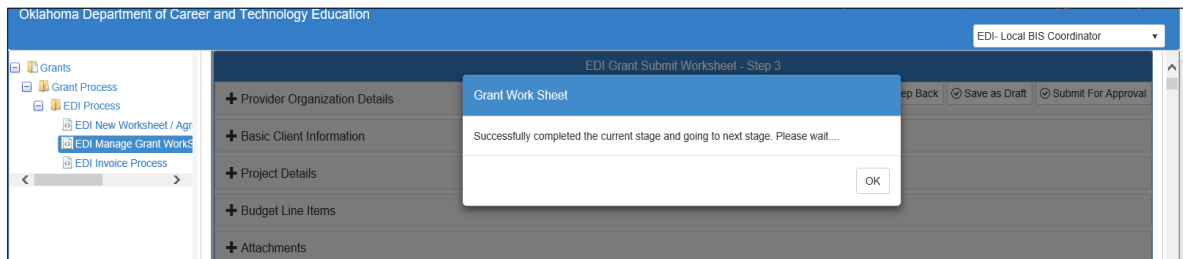
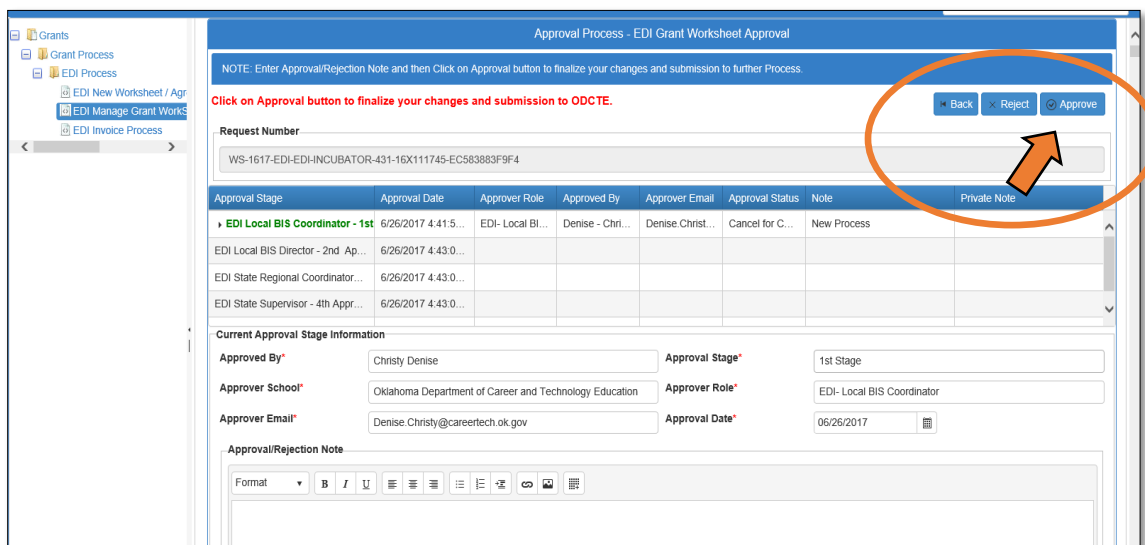
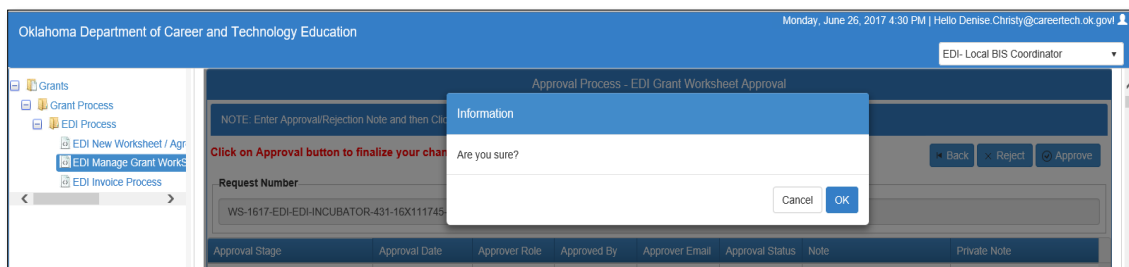
- Change the budget line description by clicking in the field under the **Budget Line Desc.** column.
- Change the **Req. Units**, **Req. Unit Cost**, and/or the **Req. Unit Type** columns to adjust the budget line items. This will change the Total columns
- To make a budget line item inactive, click inside the field under the **Status** column to check the box.

| Budget Line Desc. | Req. Units | Req. Unit Cost | Req. Unit Type | Work Sheet Total | Req. Total | Matched Funds | Status |
|---------------------------------|------------|----------------|------------------|------------------|-------------|---------------|--------|
| UT/VIATV SAFETY CLASS | 1.00 | \$150.00 | Cost Per Class | \$150.00 | \$150.00 | | Active |
| ECSI CPR/FIRST-AID/AED CLASS | 5.00 | \$180.00 | Cost Per Class | \$900.00 | \$900.00 | | Active |
| ADVANCED PUMPER CLASS | 1.00 | \$6,500.00 | Cost Per Class | \$6,500.00 | \$6,500.00 | | Active |
| FLAMMABLE LIQUID AND GASS CLASS | 1.00 | \$4,400.00 | Cost Per Student | \$4,400.00 | \$4,400.00 | | Active |
| | | | | \$11,950.00 | \$11,950.00 | | |

1.7 - After making the changes to the **Project Details** and **Budget Line Items** sections, go to the **Acknowledgement** section and check the certification box and add an acknowledgment note. The **Acknowledgment Note** is a required field. You can add your initials if you do not have a note to add.

NOTE: Once the changes, or partial changes have been made, you can **Save as Draft** by clicking **Save as Draft**. This will save the changes to the worksheet without summing to the next approval stage, so you can return and finish at a later time.

1.8 - Select **Submit for Approval** if the changes to the Worksheet are complete.

1.9 - Click OK.**1.10 - Select Approve to send changes to next approval stage.****1.11 - Click OK at the “Are you sure?” message.**

The worksheet will go back through the regular approval process.

Agreement Process

*career***tech**

Agreement Process Flow

The Agreement is the working copy of the Budget Line Items that contain the OCAS codes and details of planned expenditures. Only the Agreement can be changed once the worksheet is fully approved by ODCTE staff and the Agreement created (changes cannot be made to the Worksheet after the Agreement is created.)

The Agreement can be started when the Local Coordinator receives the email that the Worksheet has been fully approved.

Roles: Agreement Process

Stage 1 - Local Coordinator – Initiates the Agreement approval process. (No changes should need to be made.)



Stage 2 – Local BIS Director – Approves the Agreement.



Stage 3 – State Regional Coordinator – Approves the Agreement. The approval will generate a signature on the SOU.



Stage 4 – State Initiative Supervisor - Approves the Agreement. The approval will generate a signature on the SOU.



Stage 5 – Local Superintendent/CEO (or designee) – Approves the Agreement. The approval will generate a signature on the SOU.



Stage 6 - State Requisition Coordinator – Generates the SOU, submits the requisition to finance, enters the PO number into the Agreement.



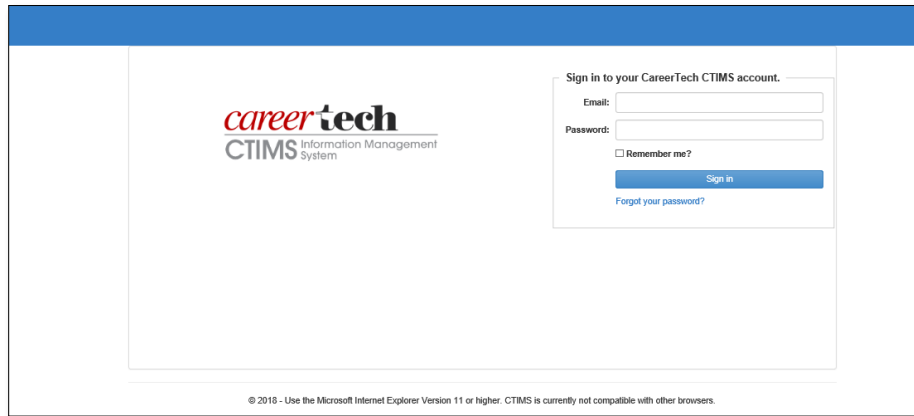
Stage 7 - Local Finance Coordinator – Enters the OCAS codes and adds new codes as needed. The Agreement becomes fully approved. (The tech center is responsible for selecting OCAS codes. See <https://www.okcareertech.org/about/state-agency/divisions/imd/ctims/OCASCodesforBIS.xlsx> for codes.)


IMPORTANT: The Local Coordinator can initiate the budget adjustment process at any time during the Agreement process as long as an invoice has not been started. The Local Coordinator must contact the Regional Coordinator prior to initiating the budget adjustment process.

Local Coordinator

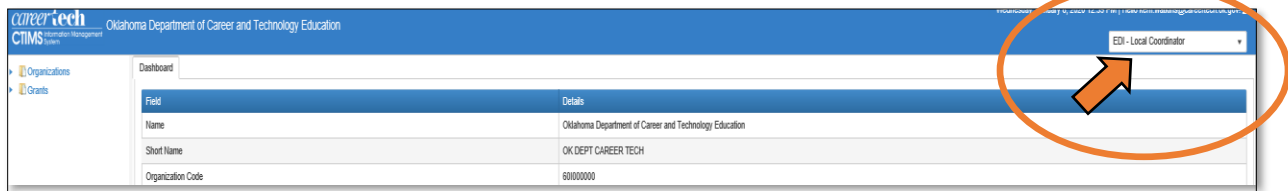
Accessing the Agreement List

- Sign in at <https://ctims.okcareertech.org/CTBDSWeb/> using your school email and CTIMS password.

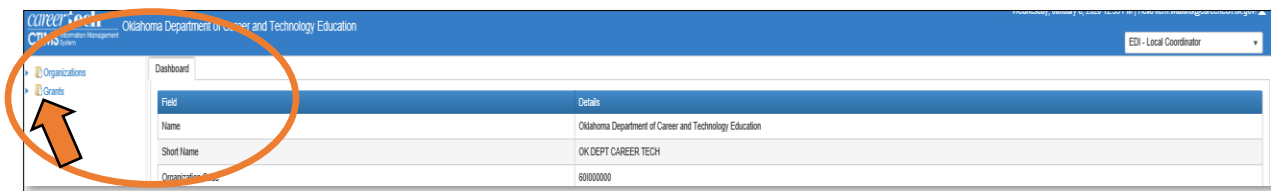


IMPORTANT: Please log into CTIMS using Internet Explorer  version 11 or higher or Microsoft Edge . CTIMS is currently not compatible with other browsers.

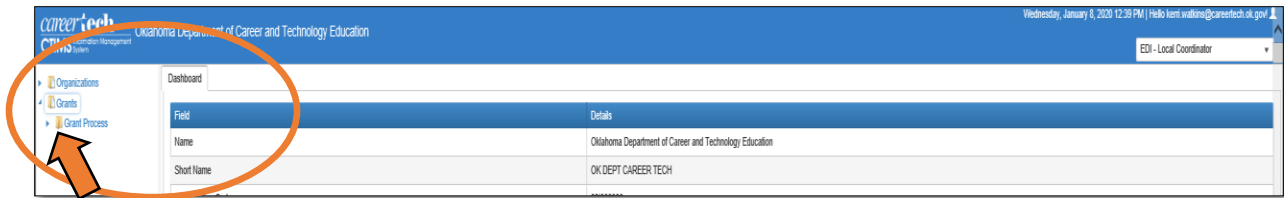
- Verify that you are signed in with the role of an **EDI Local Coordinator**. In the top right corner. Use the drop-down arrow to select this role.



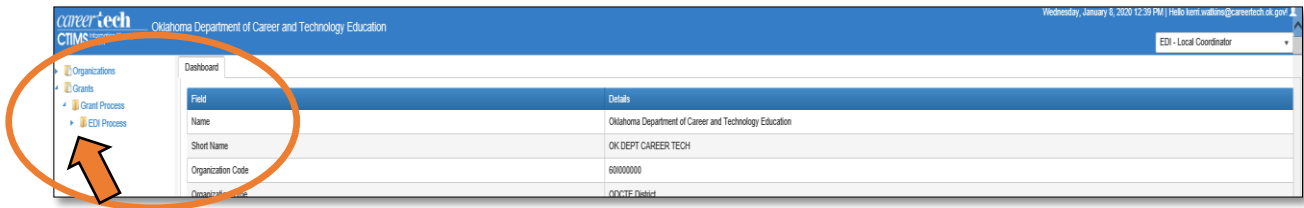
- Click the arrow |▶ next to **Grants** on left navigation.



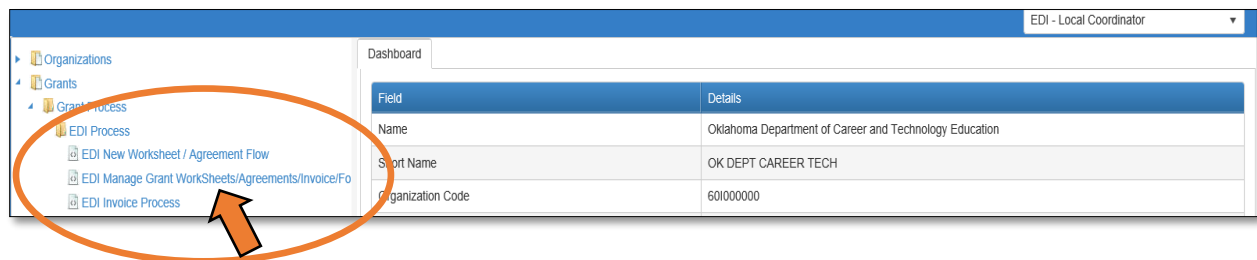
- Click the arrow ► next to **Grant Process** on left navigation.



- Click the arrow ► next to **EDI Process** on left navigation.



- Select **EDI Manage Grant WorkSheets/Agreements/Invoice/Follow-up**.



IMPORTANT: Do not select the EDI New Worksheet/Agreement Flow option on the left navigation. This will start a completely new worksheet.

Opening the Agreement

1.1 - Complete the **EDI Grant Fund Worksheets List** form. The tagged numbers on the screenshot correspond to the instruction steps below. Many of these fields will automatically display based on your organization login credentials.

1. Verify **Fiscal Calendar Year*** to make sure correct year is showing.
2. Verify **Grant Fund Type*** is set to EDI.
3. Select your correct **Organization Type** from the drop-down menu.
4. Select your **Organization*** by typing in the first three characters of the name.
5. Verify the **Organization District*** if it does not automatically appear after typing the first three letters of your Organization name or if you need to select a different Organization District.
6. Select a **Program Initiative***.
7. **Approval Function Type** will remain as **All**.
8. **Filter on Status** will remain as **All**.
9. Select the **Search** button to search for any outstanding worksheets/applications that need your approval.

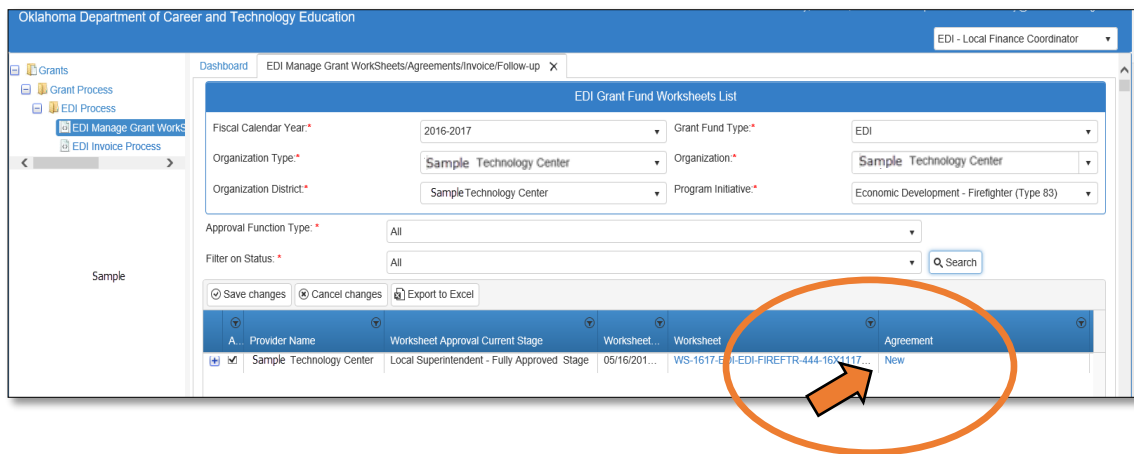
NOTE: A red asterisk (*) indicates a required field.

The screenshot shows the 'EDI Grant Fund Worksheets List' form. The fields and their corresponding callout numbers are:

- 1** - Fiscal Calendar Year* (dropdown menu showing 2019-2020)
- 2** - Grant Fund Type* (dropdown menu showing EDI)
- 3** - Organization Type* (dropdown menu showing Tech Center Districts)
- 4** - Organization* (text input field with placeholder 'Enter the first three characters of any word that is included in your organization name.')
- 5** - Organization District* (dropdown menu)
- 6** - Program Initiative* (dropdown menu showing ~Select~)
- 7** - Approval Function Type* (dropdown menu showing All)
- 8** - Filter on Status* (dropdown menu showing All)
- 9** - Search button (magnifying glass icon)

Below the form, there are buttons for 'Save changes', 'Cancel changes', and 'Export to Excel'. At the bottom, there is a table header with columns: Act, Provider Name, Client Name, Worksheet Approval Current Stage, Worksheet Submission Date, Worksheet, Agreement, Agreement Approval Current Stage, Worksheet Approved Status, Agreement Submission Date, Agreement Approved Status, BAP Process, Sub Award Allocation, and V.

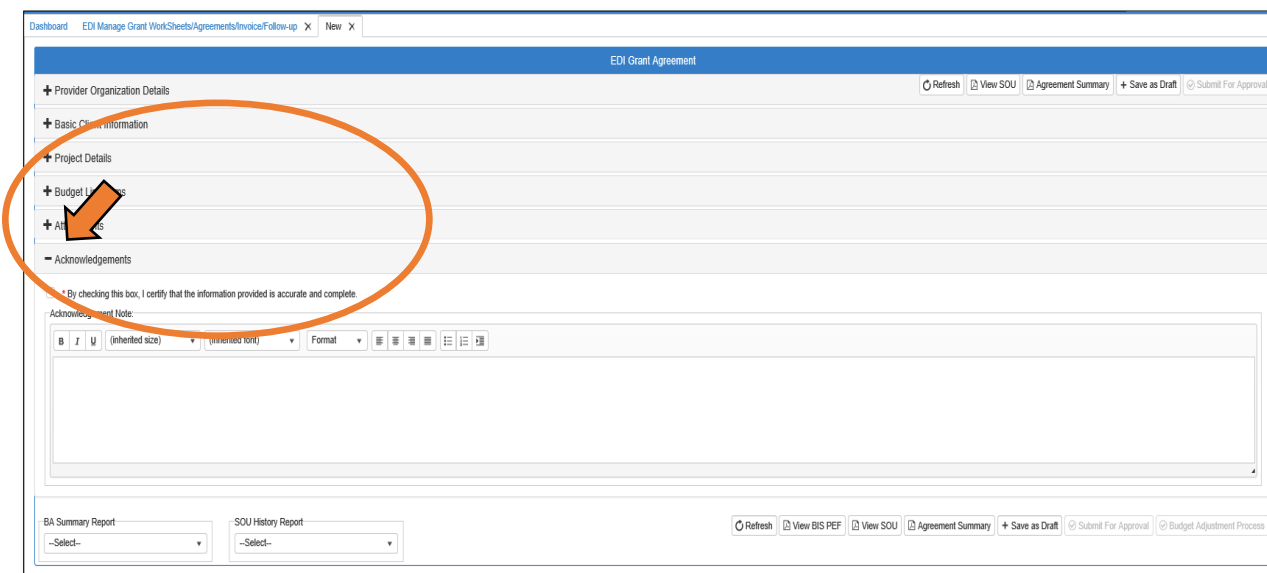
1.2 - After clicking the **Search** button, the **Agreement** column will display **New**. Select the new Agreement by clicking on the word **New**.



Agreement Acknowledgments and Approval

2.1 - Review the Agreement details, if necessary, by clicking the +(plus) sign to expand the **Project Details** or **Budget Line Items** sections.

2.2 - After reviewing the Agreement details, if necessary, click the +(plus) sign beside the **Acknowledgements** tab to expand this section. Check the box to verify that the information is accurate and complete.



2.3 - Add an acknowledgement note in the field provided. If you do not have a note to add, type your initials, as this field is required.

2.4 - Then, click on the **Save as Draft** button.

The screenshot shows the 'EDI Grant Agreement' form. The 'Acknowledgement Note' field is highlighted with a red circle and an arrow pointing to it. A yellow box with black text inside the field reads: 'Add note here. If you do not have a note to add, type your initials. This field is required.' The 'Save as Draft' button is also highlighted with a red circle and an arrow pointing to it. Other buttons like 'Refresh', 'View SOU', 'Agreement Summary', and 'Submit For Approval' are visible at the top and bottom of the form.

2.5 – Click **OK** to acknowledge that the Agreement has saved.

The screenshot shows a dialog box titled 'Grant Agreement Process'. The message inside reads: 'Successfully completed the current stage and going to next stage. Please wait....'. The 'OK' button is highlighted with a red circle and an arrow pointing to it.

2.6 – Click **Submit for Approval** at the top or bottom of the screen. The Agreement will now go to the **EDI Local BIS Director** for approval.

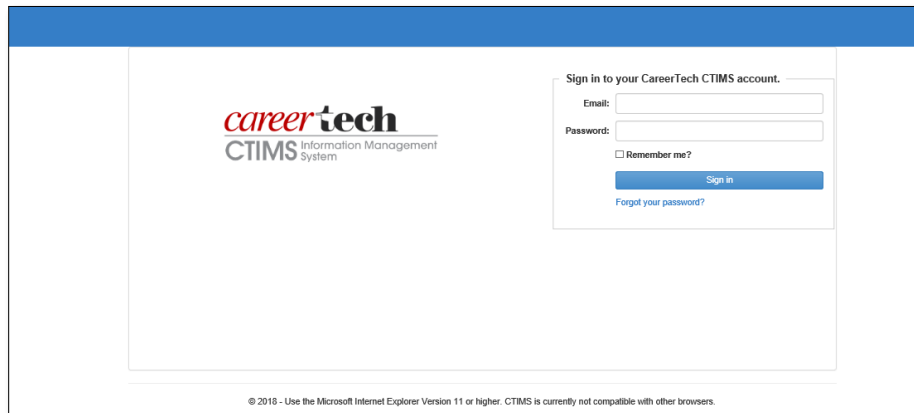
The screenshot shows the 'EDI Grant Agreement' form. At the top right, there is a button labeled 'Submit For Approval' circled in orange with an arrow pointing to it. At the bottom right, there is another button labeled 'Submit For Approval' also circled in orange with an arrow pointing to it. The form contains various fields for organization details, fiscal year, and program information.


| EDI Grant Agreement | | | |
|---|--|----------------------------------|---|
| Refresh View SOU Agreement Summary Save as Draft Submit For Approval | | | |
| Provider Organization Details | | | |
| Fiscal Calendar Year * | 2019-2020 | Grant Fund Type * | EDI |
| Organization Type * | Tech Center Districts | Organization * | Sample Technology Center Center |
| Organization District * | Sample Technology Center Center | Program Initiative * | Economic Development - Firefighter (Type 83) -444 |
| Worksheet No * | WS-1920-EDI-EDI-FIREFTR-444-07X111745-68680CAE2D8 | | |
| Agreement No * | WSAG-1920-EDI-EDI-FIREFTR-444-07X111745-49E73EE78072 | | |
| + Basic Client Information | | | |
| + Project Details | | | |
| + Budget Line Items | | | |
| + Attachments | | | |
| + Acknowledgements | | | |
| BA Summary Report --Select-- | | SOU History Report --Select-- | |
| Refresh View BIS PEF View SOU Agreement Summary Save as Draft Submit For Approval Budget Adjustment Process | | | |

Local BIS Director

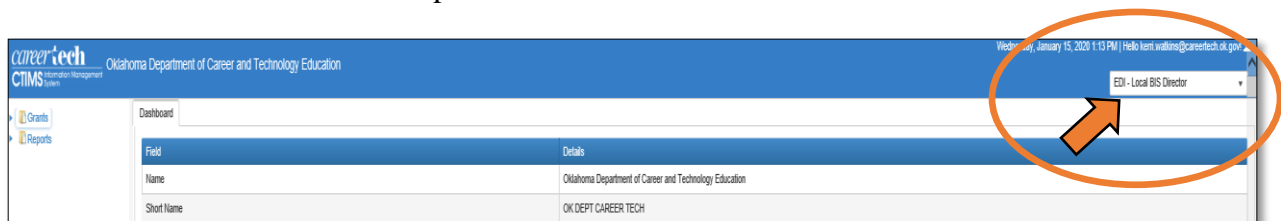
Accessing the Agreement List

- Sign in at <https://ctims.okcareertech.org/CTBDSWeb/> using your school email and CTIMS password.



IMPORTANT: Please log into CTIMS using Internet Explorer  version 11 or higher or Microsoft Edge . CTIMS is currently not compatible with other browsers.

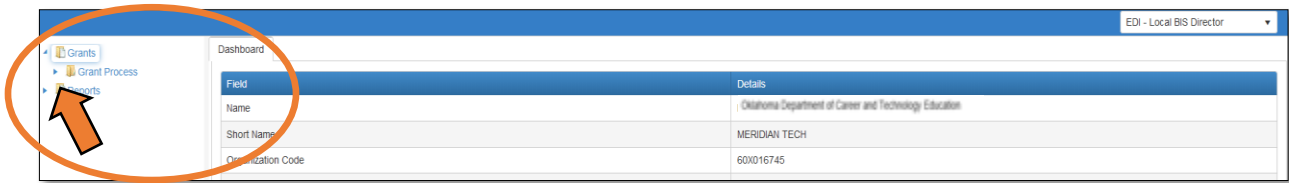
- Verify that you are signed in with the role of an **EDI Local BIS Director** in the top right-hand corner. Use the drop-down arrow to select this role.



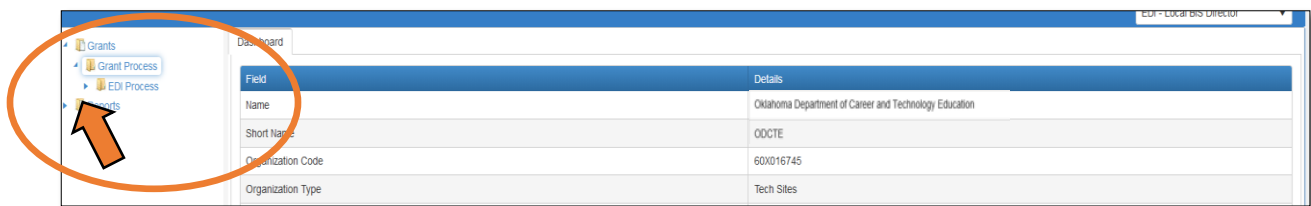
- Click the arrow | ▶ next to **Grants** on left navigation.



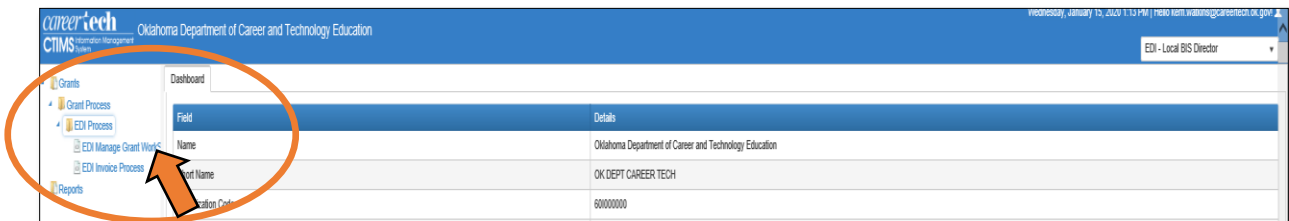
- Click the arrow ► next to **Grant Process** on left navigation.



- Click the arrow ► next to **EDI Process** on left navigation.



- Select **EDI Manage Grant WorkSheets/Agreements/Invoice/Follow-up.**



Opening the Agreement

1.1 - Complete the **EDI Grant Fund Worksheets List** form. The tagged numbers on the screenshot correspond to the instruction steps below. Many of these fields will automatically display based on your organization login credentials.

1. Verify **Fiscal Calendar Year*** to make sure correct year is showing.
2. Verify **Grant Fund Type*** is set to EDI.
3. Select your correct **Organization Type** from the drop-down menu.
4. Select your **Organization*** by typing in the first three characters of the name.
5. Verify the **Organization District*** if it does not automatically appear after typing the first three letters of your Organization name or if you need to select a different Organization District.
6. Select a **Program Initiative***.
7. **Approval Function Type** will remain as **All**.
8. **Filter on Status** will remain as **All**.
9. Select the **Search** button to search for any outstanding worksheets/applications that need your approval.

NOTE: A red asterisk (*) indicates a required field.

The screenshot shows the 'EDI Grant Fund Worksheets List' form. The fields are as follows:

- 1** - Fiscal Calendar Year*: 2019-2020
- 2** - Grant Fund Type*: EDI
- 3** - Organization Type*: Tech Center Districts
- 4** - Organization*: (empty)
- 5** - Organization District*: (empty)
- 6** - Program Initiative*: -Select-
- 7** - Approval Function Type*: All
- 8** - Filter on Status*: All
- 9** - Search button

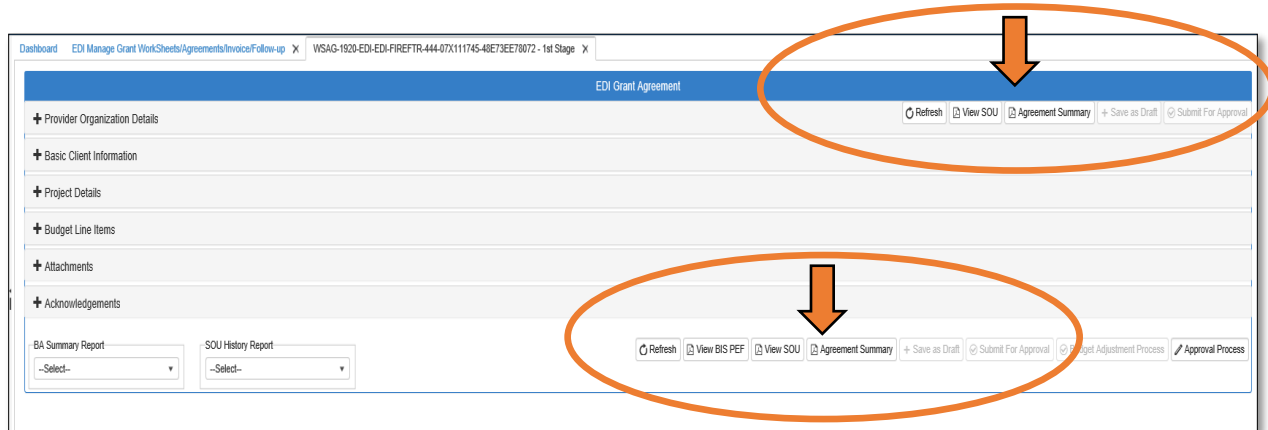
Below the form are buttons for 'Save changes', 'Cancel changes', and 'Export to Excel'. At the bottom is a table with columns: Act, Provider Name, Client Name, Worksheet Approval Current Stage, Worksheet Submission Date, Worksheet, Agreement, Agreement Approval Current Stage, Worksheet Approved Status, Agreement Submission Date, Agreement Approved Status, BAP Process, Sub Award Allocation.

1.2 - After clicking the **Search** button, the **Agreement column** will display an agreement number. Select the new agreement by clicking on the **Agreement Number**. This is a link that will open the Agreement.

Reviewing the Agreement

2.1 - Expand the **Budget Line Items** section by clicking on the + (plus) sign to review the budget.

2.2 – To review the **SOU** and/or **Agreement Summary** click on the appropriate buttons indicated below. To close out each tab after review, click the **X** on that tab.



Dashboard EDI Manage Grant WorkSheets/Agreements/Invoice/Follow-up X WSAG-1920-EDI-EDI-FIREFTR-444-07X111745-48E73EE78072 - 1st Stage X

EDI Grant Agreement

+ Provider Organization Details Refresh View SOU Agreement Summary + Save as Draft Submit For Approval

+ Basic Client Information

+ Project Details

+ Budget Line Items

+ Attachments

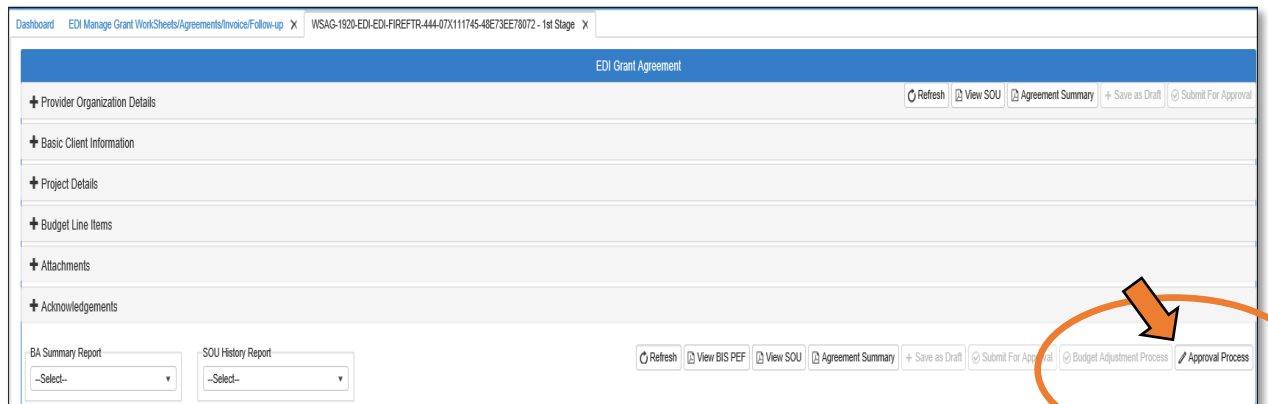
+ Acknowledgements

BA Summary Report SOU History Report

-Select- -Select-

Refresh View BIS PEF View SOU Agreement Summary + Save as Draft Submit For Approval Budget Adjustment Process Approval Process

2.3 – Once you've reviewed the Agreement, on the EDI Grant Agreement screen, click the **Approval Process** button at the bottom of the form.



Dashboard EDI Manage Grant WorkSheets/Agreements/Invoice/Follow-up X WSAG-1920-EDI-EDI-FIREFTR-444-07X111745-48E73EE78072 - 1st Stage X

EDI Grant Agreement

+ Provider Organization Details Refresh View SOU Agreement Summary + Save as Draft Submit For Approval

+ Basic Client Information

+ Project Details

+ Budget Line Items

+ Attachments

+ Acknowledgements

BA Summary Report SOU History Report

-Select- -Select-

Refresh View BIS PEF View SOU Agreement Summary + Save as Draft Submit For Approval Budget Adjustment Process Approval Process

Agreement Acknowledgements and Approval

3.1 - On the **Approval Process – EDI Grant Agreement Approval** screen, add a note to the Approval/Rejection Note section, and a note in the **Private Note** section (optional).

| Approval Stage | Approval Date | Approver Role | Approved By | Approver Email | Approval Status | Note | Private Note |
|---|----------------------|-------------------------|----------------|------------------------------|-----------------|-------------|--------------|
| EDI Local Coordinator - 1st Stage | 1/15/2020 2:19:07 PM | EDI - Local Coordinator | Keri - Watkins | kern.watkins@careertech.o... | Approved | New Process | |
| ▶ EDI BIS Director - 2nd Approval Stage | 1/17/2020 7:11:03 AM | | | | | | |
| EDI State Regional Coordinator - 3rd Approval Stage | 1/17/2020 7:11:03 AM | | | | | | |
| EDI State Supervisor - 4th Approval Stage | 1/17/2020 7:11:03 AM | | | | | | |

Current Approval Stage Information

Approved By*

Watkins Keri

Approval Stage*

2nd Approval Stage

Approver School*

Oklahoma Department of Career and Technology Education

Approver Role*

EDI - Local BIS Director

Approver Email*

kern.watkins@careertech.ok.gov

Approval Date*

01/17/2020

Approval/Rejection Note

Format ▼ B I U

Add note here. If you do not have a note to add,
type your initials. This field is required.

Private Note

Format ▼ B I U

3.2 - Click the **Approve** button at the top or bottom of the screen. Then, click **OK** on the **Are you sure?** message.

4d-1c Enter Approval/Pending Note and then Click on Approve button to Route your changes and submit to further Process.

Request Number: WSSG2-1070323-EDU-FRPT-PA-484270111784-486736370873

| Approval Stage | Approval Date | Approval Role | Approval By | Approval Email | Approval Status | Note | Private Note |
|---|----------------------|-------------------------|----------------|-------------------------------|-----------------|-------------|--------------|
| EDU Local Coordinator - 1st Stage | 1/10/2024 9:10:07 PM | EDU - Local Coordinator | Nash - Waltons | nash.walton@arkansasmh.us.gov | Approved | New Process | |
| + EDU-BIS Director - 2nd Approval Stage | 1/10/2024 7:11:03 AM | | | | | | |
| EDU State Regional Coordinator - 3rd Approval Stage | 1/10/2024 7:11:03 AM | | | | | | |
| EDU Data Supervisor - 4th Approval Stage | 1/10/2024 7:11:03 AM | | | | | | |

Current Approval Stage information

| | | | |
|-------------------------|--|------------------------|--------------------------|
| Approver Role* | Waltons,Nash | Approver Email* | [2nd] Approval Stage |
| Approver Status* | Oklahoma Department of Career and Technology Education | Approver Role* | EDU - Local BIS Director |
| Approver Email* | nash.walton@arkansasmh.us.gov | Approver Date* | 01/10/2024 [v] |

Approval/Pending Note

Format: [D] [M] [Y] [H] [M] [S] [A] [P] [AM] [PM] [v]

Note:

Private Note

Format: [D] [M] [Y] [H] [M] [S] [A] [P] [AM] [PM] [v]

Note:

| Approval Stage | File Name | Uploaded On | Date | Max File Size |
|----------------|-----------|-------------|------|---------------|
|----------------|-----------|-------------|------|---------------|

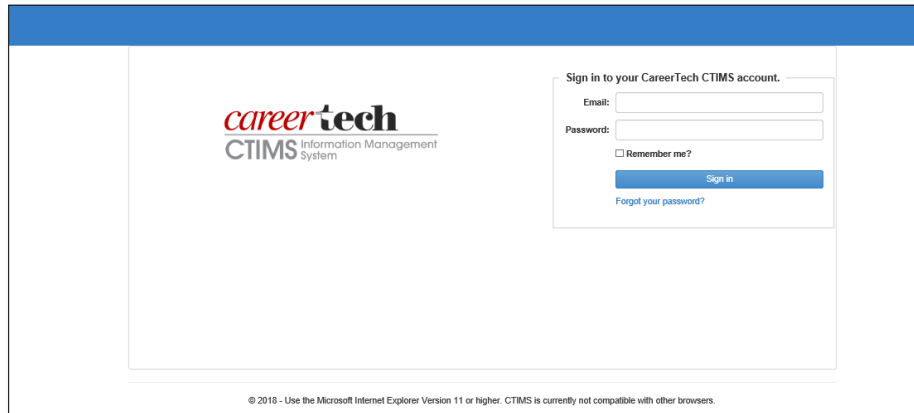
[v] Back [v] Report [v] Approve

The agreement will now go to the **EDI State Regional Coordinator** for Approval.

State Regional Coordinator

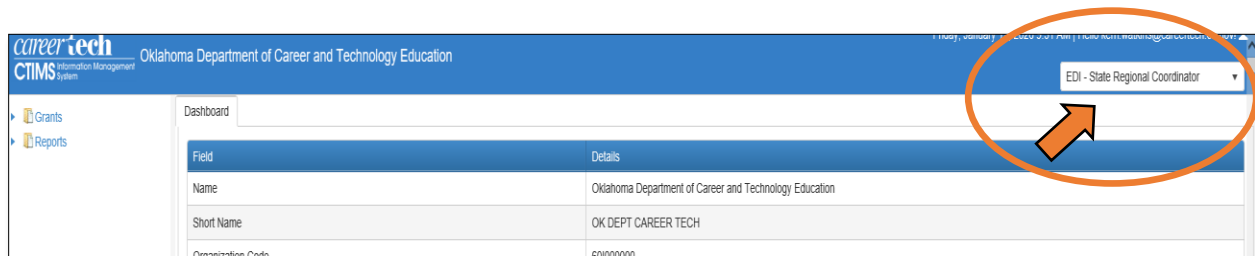
Accessing the Agreement List

- Sign in at <https://ctims.okcareertech.org/CTBDSWeb/> using your school email and CTIMS password.

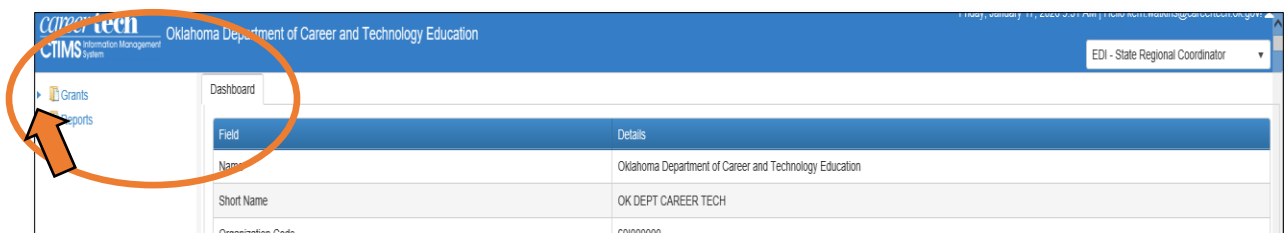


IMPORTANT: Please log into CTIMS using Internet Explorer  version 11 or higher or Microsoft Edge . CTIMS is currently not compatible with other browsers.

- Verify that you are signed in with the role of an **EDI State Regional Coordinator** in the top right-hand corner. Use the drop-down arrow to select this role.



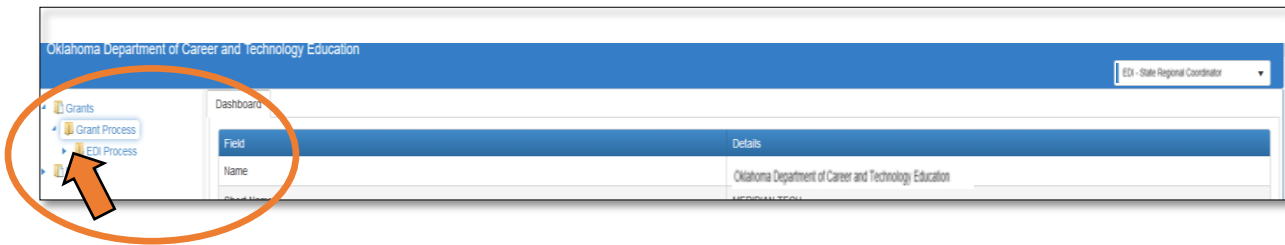
- Click the arrow ▶ next to **Grants** on left navigation.



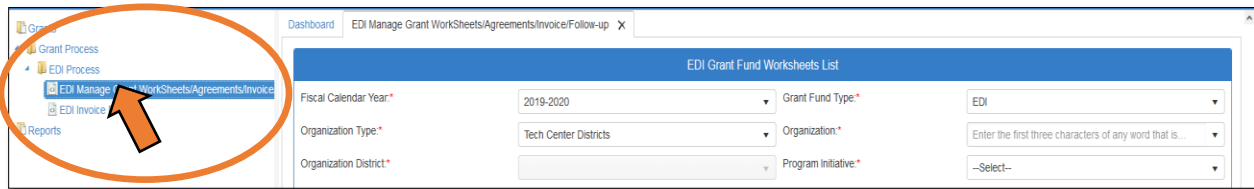
- Click the arrow ► next to **Grant Process** on left navigation.



- Click the arrow ► next to **EDI Process** on left navigation.



- Select **EDI Manage Grant WorkSheets/Agreements/Invoice/Follow-up**.



Opening the Agreement

1. Verify **Fiscal Calendar Year*** to make sure correct year is showing.
2. Verify **Grant Fund Type*** is set to EDI.
3. Select your correct **Organization Type** from the drop-down menu.
4. Select your **Organization*** by typing in the first three characters of the name.
5. Verify the **Organization District*** if it does not automatically appear after typing the first three letters of your Organization name or if you need to select a different Organization District.
6. Select a **Program Initiative***.
7. **Approval Function Type** will remain as **All**.
8. **Filter on Status** will remain as **All**.
9. Select the **Search** button to search for any outstanding worksheets/applications that need your approval.

NOTE: A red asterisk (*) indicates a required field.

Dashboard | EDI Manage Grant Worksheets/Agreements/InvoiceFollow-up X

EDI Grant Fund Worksheets List

Fiscal Calendar Year* 1 - 2019-2020 Grant Fund Type* 2 - EDI

Organization Type* 3 - Tech Center Districts Organization* 4 -

Organization District* 5 - Program Initiative* 6 - -Select-

Approval Function Type* 7 - All

Filter on Status* 8 - All Q Search - 9

✓ Save changes Cancel changes Export to Excel

| Act | Provider Name | Client Name | Worksheet Approval Current Stage | Worksheet Submission Date | Worksheet | Agreement | Agreement Approval Current Stage | Worksheet Approved Status | Agreement Submission Date | Agreement Approved Status | BAP Process | Sub Award | V |
|-----|---------------|-------------|----------------------------------|---------------------------|-----------|-----------|----------------------------------|---------------------------|---------------------------|---------------------------|-------------|-----------|---|
|-----|---------------|-------------|----------------------------------|---------------------------|-----------|-----------|----------------------------------|---------------------------|---------------------------|---------------------------|-------------|-----------|---|

1.1 - After clicking the **Search** button, the **Agreement** column will display an agreement number. Select the new agreement by clicking on the **Agreement Number**. This is a link that will open the Agreement.

Sample

EDI Grant Fund Worksheets List

Fiscal Calendar Year: 2016-2017 Grant Fund Type: EDI

Organization Type: Tech Center Districts Organization: Sample Technology Center

Organization District: Sample Technology Center Program Initiative: Economic Development - Firefighter (Type 83)

Approval Function Type: All

Filter on Status: All

Save changes Cancel changes Export to Excel

| Provider Name | Worksheet Approval Current Stage | Worksheet | Agreement |
|--------------------------|---|--------------|---|
| Sample Technology Center | Local Superintendent - Fully Approved Stage | 05/15/201... | WSAG-1819-EDI-EDI-FIREFTR-444-07X117... WSAG-1819-EDI-EDI-FIREFTR-444-07X1... |

Reviewing the Agreement

2.1 - Expand the **Budget Line Items** section by clicking on the + (plus) sign to review the budget.

EDI Grant Agreement

+ Provider Organization Details Refresh View SOU Agreement Summary Save as Draft Submit For Approval

+ Basic Client Information

+ Project Details

- Budget Line Items

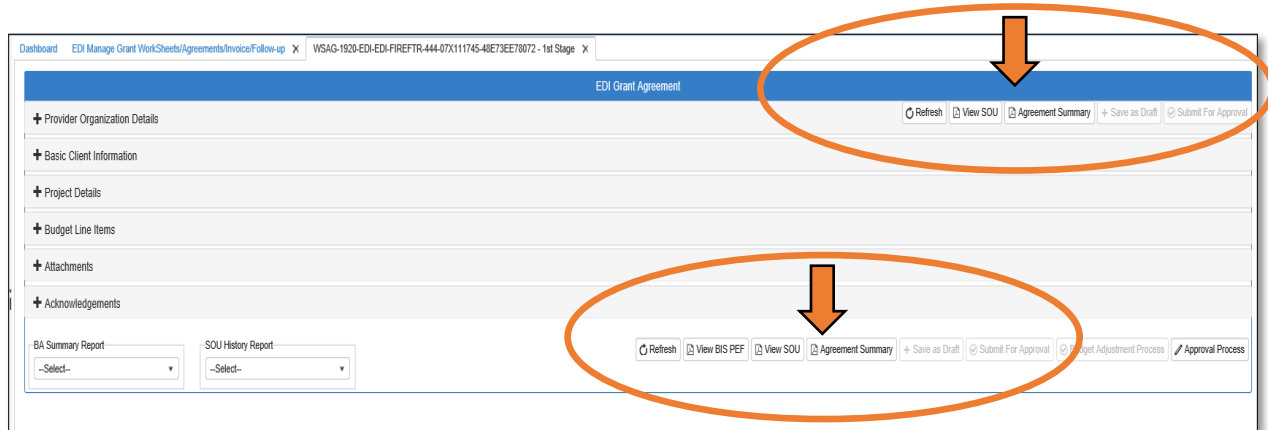
Grant Allocation

| Sub Award Allocation | Worksheet Budgeted | Agreement Budgeted | Fully Approved Invoiced | Agreement Unbudgeted = (Allocated - Agmt. Budgeted) | Remaining to Invoice |
|----------------------|--------------------|--------------------|-------------------------|---|----------------------|
| \$3,986.00 | \$2,650.00 | \$0.00 | \$0.00 | \$3,986.00 | \$0.00 |

Add Budget Line Remove Budget Line Cancel Budget Line Changes

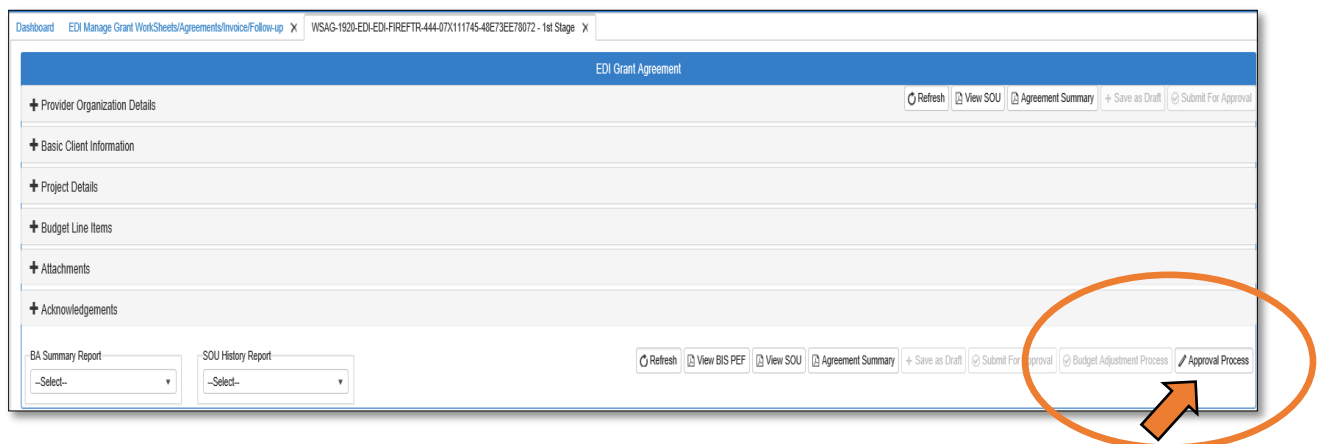
| Budget Line(OCAS CODE) Program - Function - Object | Agreement Line Desc | Units | Unit Cost | Req. Unit Type | Total | Approv Total | Matched Funds |
|---|-----------------------|-------|-----------|----------------|------------|--------------|---------------|
| | Firefighter Workbooks | 10 | \$15.00 | Cost Per Each | \$150.00 | \$150.00 | |
| | Tech Supplies | 10 | \$250.00 | Cost Per Each | \$2,500.00 | \$2,500.00 | |

2.2 – To review the **SOU** and/or **Agreement Summary** click on the appropriate buttons indicated below. To close out each tab after review, click the **X** on that tab.



The screenshot shows the 'EDI Grant Agreement' screen. At the top, there is a blue header bar with the title 'EDI Grant Agreement' and a close button 'X'. Below the header, there are several sections: 'Provider Organization Details', 'Basic Client Information', 'Project Details', 'Budget Line Items', 'Attachments', and 'Acknowledgements'. At the bottom of the screen, there are two dropdown menus: 'BA Summary Report' and 'SOU History Report'. To the right of these dropdowns, there is a row of buttons: 'Refresh', 'View BIS PEF', 'View SOU', 'Agreement Summary', '+ Save as Draft', 'Submit For Approval', 'Budget Adjustment Process', and 'Approval Process'. Two orange circles with arrows point to the 'Agreement Summary' button in the top right and the 'Agreement Summary' button in the bottom right.

2.3 – Once you've reviewed the Agreement, on the **EDI Grant Agreement** screen, click the **Approval Process** button at the bottom of the form.



This screenshot is identical to the one above, showing the 'EDI Grant Agreement' screen. An orange circle with an arrow points to the 'Approval Process' button at the bottom right of the screen.

Agreement Acknowledgements and Approval

3.1 - On the **Approval Process – EDI Grant Agreement Approval** screen, add a note to the **Approval/Rejection Note** section, and a note in the **Private Note** section (optional).

| Approval Stage | Approval Date | Approver Role | Approved By | Approver Email | Approval Status | Note | Private Note |
|---|----------------------|-------------------------|-----------------|-------------------------------|-----------------|-------------|--------------|
| EDI Local Coordinator - 1st Stage | 1/15/2020 2:19:07 PM | EDI - Local Coordinator | Kerri - Watkins | kerri.watkins@careertech.o... | Approved | New Process | |
| ➤ EDI BIS Director - 2nd Approval Stage | 1/17/2020 7:11:03 AM | | | | | | |
| EDI State Regional Coordinator - 3rd Approval Stage | 1/17/2020 7:11:03 AM | | | | | | |
| EDI State Supervisor - 4th Approval Stage | 1/17/2020 7:11:03 AM | | | | | | |

Current Approval Stage Information

Approved By* Approval Stage*

Approver School* Approver Role*

Approver Email* Approval Date*

Approval/Rejection Note

Format

Add note here. If you do not have a note to add, type your initials. This field is required.

Private Note

Format

3.2 - Click the **Approve** button at the top or bottom of the screen. Then, click **OK** on the **Are you sure?** message.

[illegible]

The Agreement will now go to the **EDI State Initiative Supervisor** for approval.

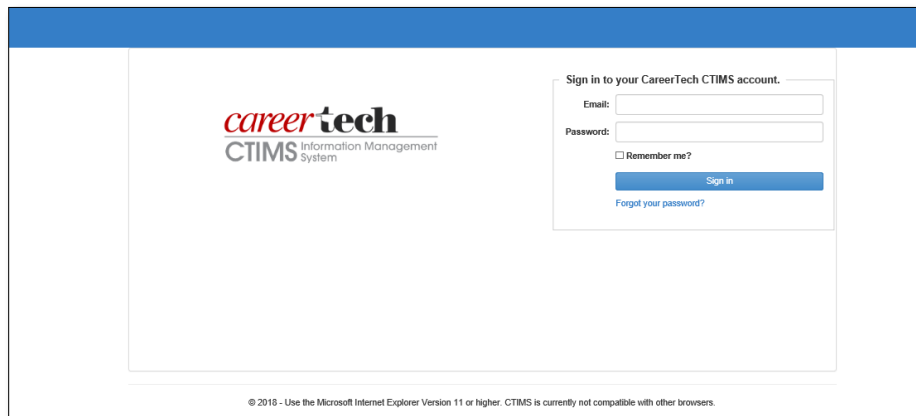
State Initiative Supervisor

See instructions for Regional Coordinator [here](#).

Local Superintendent/CEO (or Designee)

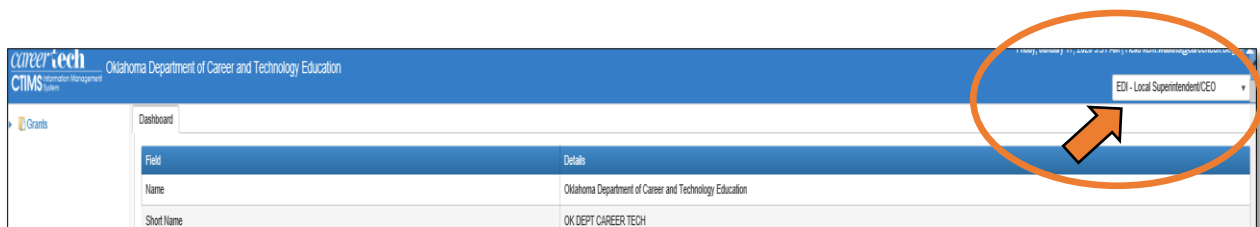
Accessing the Agreement List


- Sign in at <https://ctims.okcareertech.org/CTBDSWeb/> using your school email and CTIMS password.

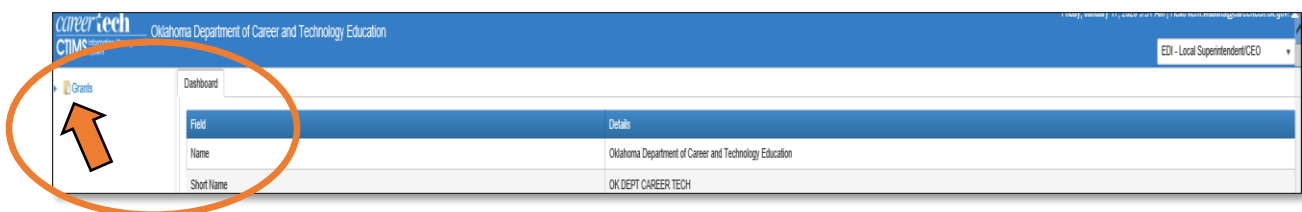


IMPORTANT: Please log into CTIMS using Internet Explorer  version 11 or higher or Microsoft Edge . CTIMS is currently not compatible with other browsers.

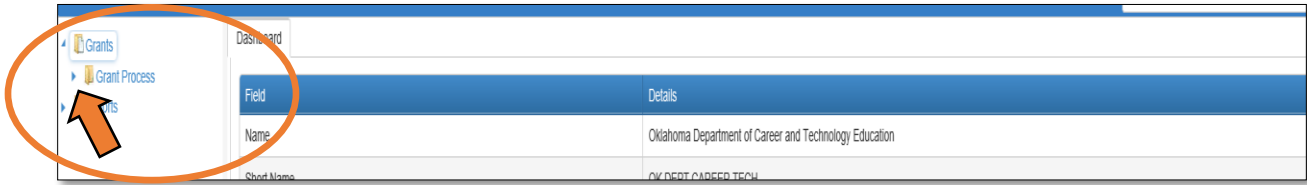
- Verify that you are signed in with the role of an **EDI Local Superintendent/CEO** in the top right-hand corner. Use the drop-down arrow to select this role.



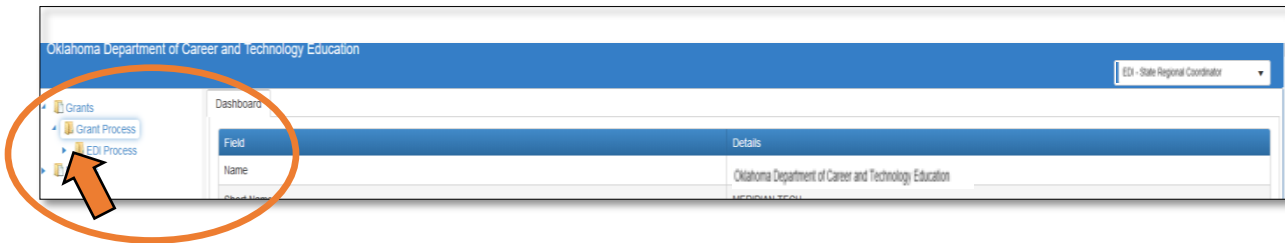
- Click the arrow  next to **Grants** on left navigation.



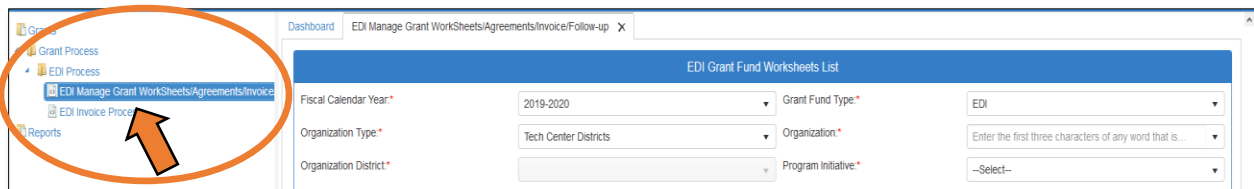
- Click the arrow | ► next to **Grant Process** on left navigation.



- Click the arrow | ► next to **EDI Process** on left navigation.



- Select **EDI Manage Grant WorkSheets/Agreements/Invoice/Follow-up.**



Opening the Agreement

1. Verify **Fiscal Calendar Year*** to make sure correct year is showing.
2. Verify **Grant Fund Type*** is set to EDI.
3. Select your correct **Organization Type** from the drop-down menu.
4. Select your **Organization*** by typing in the first three characters of the name.
5. Verify the **Organization District*** if it does not automatically appear after typing the first three letters of your Organization name or if you need to select a different Organization District.
6. Select a **Program Initiative***.
7. **Approval Function Type** will remain as **All**.
8. **Filter on Status** will remain as **All**.
9. Select the **Search** button to search for any outstanding worksheets/applications that need your approval.

NOTE: A red asterisk (*) indicates a required field.

Dashboard | EDI Manage Grant Worksheets/Agreements/Invoice Follow-up | X

EDI Grant Fund Worksheets List

Fiscal Calendar Year* 1 - 2019-2020 Grant Fund Type* 2 - EDI

Organization Type* 3 - Tech Center Districts Organization* 4 -

Organization District* 5 - Program Initiative* 6 - -Select-

Approval Function Type* 7 - All

Filter on Status* 8 - All Q Search - 9

✓ Save changes Cancel changes Export to Excel

| Act | Provider Name | Client Name | Worksheet Approval | Submission Date | Worksheet | Agreement | Agreement Approval | Worksheet Approved | Agreement Submission Date | Agreement Approved Status | BAP | Sub Award | V |
|-----|---------------|-------------|--------------------|-----------------|-----------|-----------|--------------------|--------------------|---------------------------|---------------------------|-----|-----------|---|
|-----|---------------|-------------|--------------------|-----------------|-----------|-----------|--------------------|--------------------|---------------------------|---------------------------|-----|-----------|---|

1.1 - After clicking the **Search** button, the **Agreement column** will display an agreement number. Select the new agreement by clicking on the **Agreement Number**. This is a link that will open the Agreement.

Reviewing the Agreement

2.1 - Expand the **Budget Line Items** section by clicking on the + (plus) sign to review the budget.

| Budget Line (OCAS CODE) | Program - Function - Object | Agreement Line Desc | Units | Unit Cost | Req. Unit Type | Total | Approv Total | Matched Funds |
|-------------------------|-----------------------------|-----------------------|-------|-----------|----------------|------------|--------------|---------------|
| | | Firefighter Workbooks | 10 | \$15.00 | Cost Per Each | \$150.00 | \$150.00 | |
| | | Tech Supplies | 10 | \$250.00 | Cost Per Each | \$2,500.00 | \$2,500.00 | |

2.2 – To review the **SOU** and/or **Agreement Summary** click on the appropriate buttons indicated below. To close out each tab after review, click the ✕ on that tab.

The screenshot shows the 'EDI Grant Agreement' screen. The top navigation bar includes buttons for 'Refresh', 'View SOU', 'Agreement Summary', '+ Save as Draft', and 'Submit For Approval'. The bottom action bar includes buttons for 'Refresh', 'View BIS PEF', 'View SOU', 'Agreement Summary', '+ Save as Draft', 'Submit For Approval', 'Budget Adjustment Process', and 'Approval Process'. Two orange ovals with arrows highlight the 'View SOU' and 'Agreement Summary' buttons in both the top and bottom bars.

2.3 – Once you’ve reviewed the Agreement, on the **EDI Grant Agreement** screen, click the **Approval Process** button at the bottom of the form.

The screenshot shows the 'EDI Grant Agreement' screen. The bottom action bar includes buttons for 'Refresh', 'View BIS PEF', 'View SOU', 'Agreement Summary', '+ Save as Draft', 'Submit For Approval', 'Budget Adjustment Process', and 'Approval Process'. An orange oval with an arrow highlights the 'Approval Process' button.

Agreement Acknowledgements and Approval

3.1 - On the **Approval Process – EDI Grant Agreement Approval** screen, add a note to the **Approval/Rejection Note** section, and a note in the **Private Note** section (optional).

| Approval Stage | Approval Date | Approver Role | Approved By | Approver Email | Approval Status | Note | Private Note |
|---|----------------------|-------------------------|-----------------|-------------------------------|-----------------|-------------|--------------|
| EDI Local Coordinator - 1st Stage | 1/15/2020 2:19:07 PM | EDI - Local Coordinator | Kerri - Watkins | kerri.watkins@careertech.o... | Approved | New Process | |
| ➤ EDI BIS Director - 2nd Approval Stage | 1/17/2020 7:11:03 AM | | | | | | |
| EDI State Regional Coordinator - 3rd Approval Stage | 1/17/2020 7:11:03 AM | | | | | | |
| EDI State Supervisor - 4th Approval Stage | 1/17/2020 7:11:03 AM | | | | | | |

Current Approval Stage Information

| | | | |
|------------------|--|-----------------|---|
| Approved By* | Watkins Kerri | Approval Stage* | 2nd Approval Stage |
| Approver School* | Oklahoma Department of Career and Technology Education | Approver Role* | EDI - Local BIS Director |
| Approver Email* | kerri.watkins@careertech.ok.gov | Approval Date* | 01/17/2020 <input type="button" value="P"/> |

Approval/Rejection Note

Format

Add note here. If you do not have a note to add, type your initials. This field is required.

Private Note

Format

3.2 - Click the **Approve** button at the top or bottom of the screen. Then, click **OK** on the **Are you sure?** message.

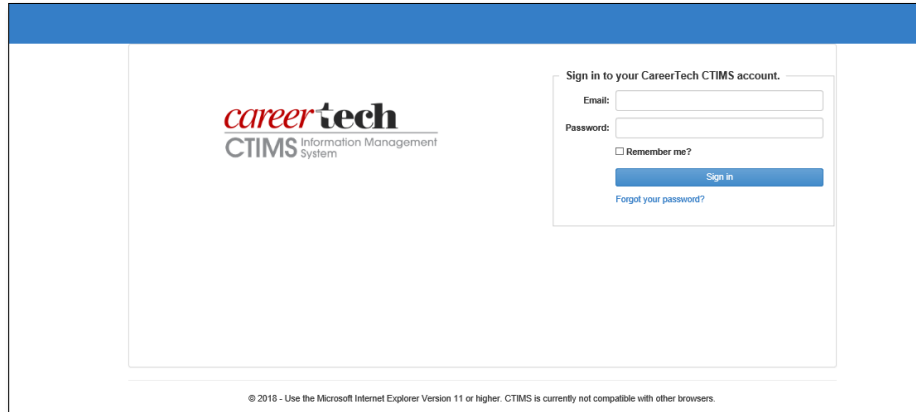
[illegible]

The Agreement will now go to the **Local Finance Coordinator** for approval.

Local Finance Coordinator

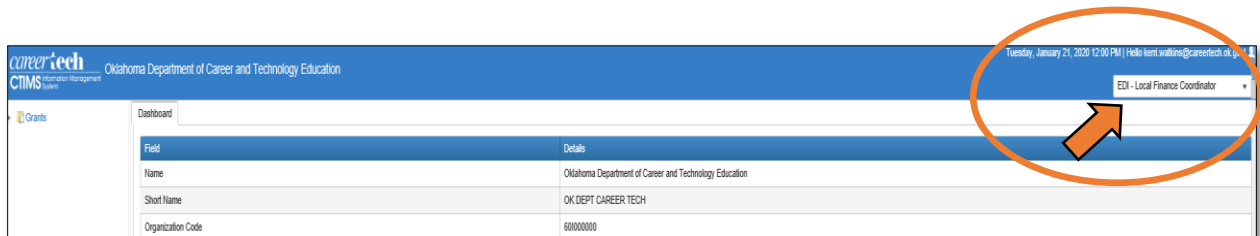
Accessing the Agreement List


- Sign in at <https://ctims.okcareertech.org/CTBDSWeb/> using your school email and CTIMS password.



IMPORTANT: Please log into CTIMS using Internet Explorer  version 11 or higher or Microsoft Edge . CTIMS is currently not compatible with other browsers.

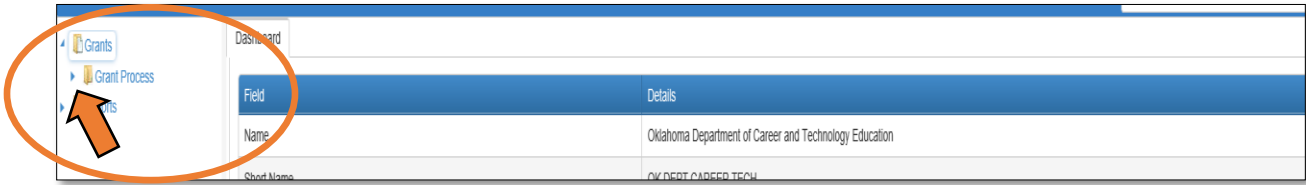
- Verify that you are signed in with the role of an **EDI Local Finance Coordinator** in the top right-hand corner. Use the drop-down arrow to select this role.



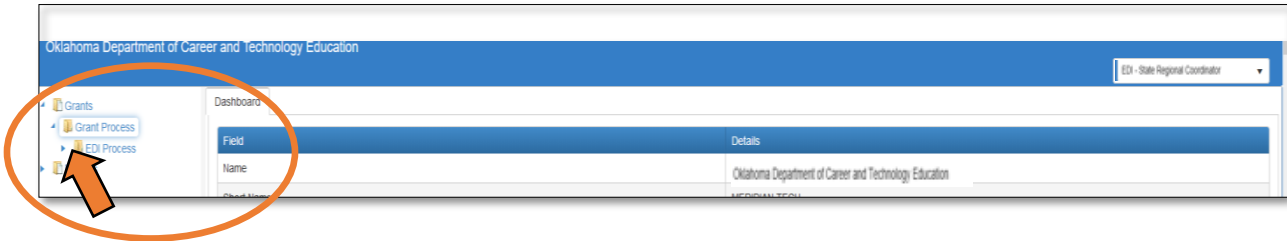
- Click the arrow  next to **Grants** on left navigation.



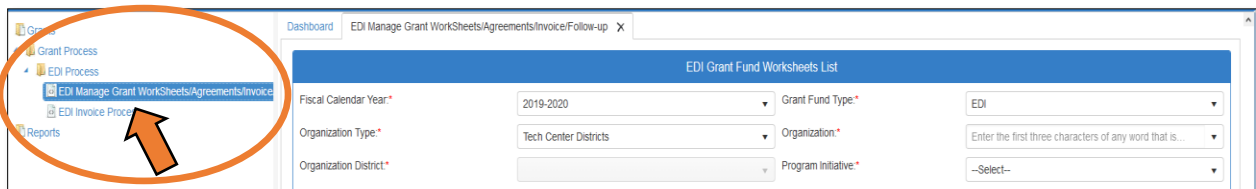
- Click the arrow | ► next to **Grant Process** on left navigation.



- Click the arrow | ► next to **EDI Process** on left navigation.



- Select **EDI Manage Grant WorkSheets/Agreements/Invoice/Follow-up**.



Opening the Agreement

1. Verify **Fiscal Calendar Year*** to make sure correct year is showing.
2. Verify **Grant Fund Type*** is set to EDI.
3. Select your correct **Organization Type** from the drop-down menu.
4. Select your **Organization*** by typing in the first three characters of the name.
5. Verify the **Organization District*** if it does not automatically appear after typing the first three letters of your Organization name or if you need to select a different Organization District.
6. Select a **Program Initiative***.
7. **Approval Function Type** will remain as **All**.
8. **Filter on Status** will remain as **All**.
9. Select the **Search** button to search for any outstanding worksheets/applications that need your approval.

NOTE: A red asterisk (*) indicates a required field.

The screenshot shows the 'EDI Grant Fund Worksheets List' form. The form has a blue header bar with the title 'EDI Grant Fund Worksheets List'. Below the header, there are several input fields and buttons. The fields are labeled with red asterisks to indicate they are required. The form is annotated with red numbers 1 through 9, corresponding to the steps in the 'Opening the Agreement' section.

Fields and annotations:

- 1 - Fiscal Calendar Year*
- 2 - Grant Fund Type*
- 3 - Organization Type*
- 4 - Organization*
- 5 - Organization District*
- 6 - Program Initiative*
- 7 - Approval Function Type*
- 8 - Filter on Status*
- 9 - Search button

Buttons at the bottom of the form include: Save changes, Cancel changes, and Export to Excel.

At the bottom of the form, there is a table with columns for various stages of the process:

| Act | Provider Name | Client Name | Worksheet Approval Current Stage | Worksheet Submission Date | Worksheet | Agreement | Agreement Approval Current Stage | Worksheet Approved Status | Agreement Submission Date | Agreement Approved Status | BAP Process | Sub Award Allocation |
|-----|---------------|-------------|----------------------------------|---------------------------|-----------|-----------|----------------------------------|---------------------------|---------------------------|---------------------------|-------------|----------------------|
|-----|---------------|-------------|----------------------------------|---------------------------|-----------|-----------|----------------------------------|---------------------------|---------------------------|---------------------------|-------------|----------------------|

1.1 - After clicking the Search button, the agreement column will display an agreement number. Select the agreement by clicking on the **Agreement Number**. This is a link that will open the agreement.

Reviewing the Agreement

2.1 - Expand the **Budget Line Items** section by clicking on the + (plus) sign, if necessary. Review the budget.

Entering OCAS Codes

3.1 – Enter the OCAS coding for each of the line items by clicking in the field under the Budget Line (OCAS Code) column. Begin typing the code in Object-Program-Function Code (e.g. 610-590-1500) order. As you begin typing the OCAS code, a drop-down of OCAS codes will come up that you can select from. Select the valid OCAS code for each budget item. Use the scroll bar at the bottom of the page to scroll to the right and input any Matched Funds.

NOTE: The tech center is responsible for selecting OCAS codes. See <https://www.okcareertech.org/about/state-agency/divisions/imd/ctims/OCASCodesforBIS.xlsx> for codes.

The screenshot shows the 'Budget Line Items' section of a software interface. At the top, there are summary fields for Grant Allocation, Worksheet Budgeted, Worksheet Requested Total, Agreement Budgeted, Fully Approved Invoiced, Agreement Unbudgeted, and Remaining to Invoice. Below these is a table with columns for Budget Line(s), Budget Line Detail Information, and various financial metrics. An orange circle highlights the 'Budget Line(OCAS CODE)' column, and an orange arrow points to the first row's entry '1500-610-590'.

| Budget Line(OCAS CODE) | Function - Object - Program | Agreement Line Desc. | Units | Unit Cost | Req. Unit Type | Total | Approv Total | Matched Funds | Status | Budget Line Desc. | Req. Unit Type | Req. Units | Req. Unit Cost | Work Sheet Req. Total | Work Sheet Total | Allocated | Avail. to Invoice |
|------------------------|-----------------------------------|---|-------|-----------|----------------|----------|--------------|---------------|--------|-----------------------------------|----------------|------------|----------------|-----------------------|------------------|-----------|-------------------|
| 1500-610-590 | Emergency Vehicle Driver Training | Emergency Vehicle Driver Training (15-16) Item: | 16 | \$43.06 | Cost Per Hour | \$688.96 | \$688.96 | \$0.00 | Active | Emergency Vehicle Driver Training | Hour | 16 | \$43.06 | \$688.96 | \$688.96 | \$0.00 | \$0.00 |

3.2 – After reviewing the budget information and entering the OCAS codes, click on the **Approval Process** button at the bottom of the screen.

The screenshot shows the bottom portion of the software interface. It includes a 'Notes' section with a text area and a 'Maximum 1000 characters length' warning. Below the notes are sections for 'Attachments' and 'Acknowledgements'. At the very bottom, there is a navigation bar with buttons for 'Refresh', 'View BIS PDF', 'View SOU', 'Agreement Summary', 'Save as Draft', 'Submit For Approval', 'Change Request', 'Budget Adjustment Process', and 'Approval Process'. An orange circle highlights the 'Approval Process' button, with an orange arrow pointing to it.

Agreement Acknowledgements and Approval

4.1 - On the **Approval Process – EDI Grant Agreement Approval** screen, add a note to the **Approval/Rejection Note** section, and a note in the **Private Note** section (optional). You can add your initials if you do not have a note to add.

| Approval Stage | Approval Date | Approver Role | Approved By | Approver Email | Approval Status | Note | Private Note |
|---|----------------------|-------------------------|----------------|--------------------------------|-----------------|-------------|--------------|
| EDI Local Coordinator - 1st Stage | 1/15/2020 2:19:07 PM | EDI - Local Coordinator | Keri - Watkins | keri.watkins@careertech.ok.gov | Approved | New Process | |
| EDI BIS Director - 2nd Approval Stage | 1/17/2020 7:11:03 AM | | | | | | |
| EDI State Regional Coordinator - 3rd Approval Stage | 1/17/2020 7:11:03 AM | | | | | | |
| EDI State Supervisor - 4th Approval Stage | 1/17/2020 7:11:03 AM | | | | | | |


Current Approval Stage Information

| | | | |
|------------------|--|-----------------|---------------------------------|
| Approved By* | Watkins Keri | Approval Stage* | 2nd Approval Stage |
| Approver School* | Oklahoma Department of Career and Technology Education | Approver Role* | EDI - Local BIS Director |
| Approver Email* | keri.watkins@careertech.ok.gov | Approval Date* | 01/17/2020 <input type="text"/> |

Approval/Rejection Note

Format

Add note here. If you do not have a note to add, type your initials. This field is required.



Private Note

Format

4.2 - Click the **Approve** button at the top or bottom of the screen. Then, click **OK** on the **Are you sure?** message.

[illegible]

The Agreement is now fully approved.

Budget Adjustment Process

*career***tech**

Budget Adjustment Process

After an Agreement is submitted for approval, you must go through the **Budget Adjustment Process** to make any changes.

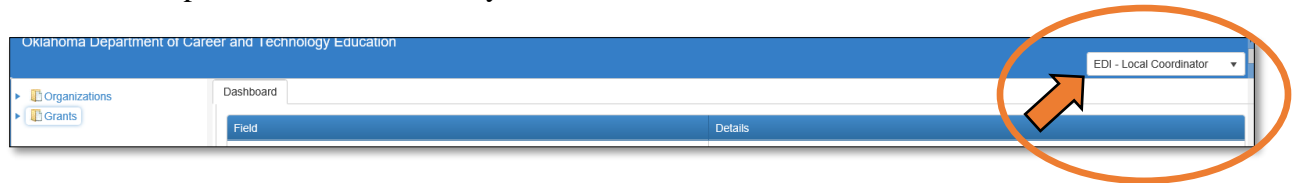
IMPORTANT: Initiating the Budget Adjustment will freeze any invoice in process. The Agreement will be sent back to your approval stage.

Accessing the Agreement List

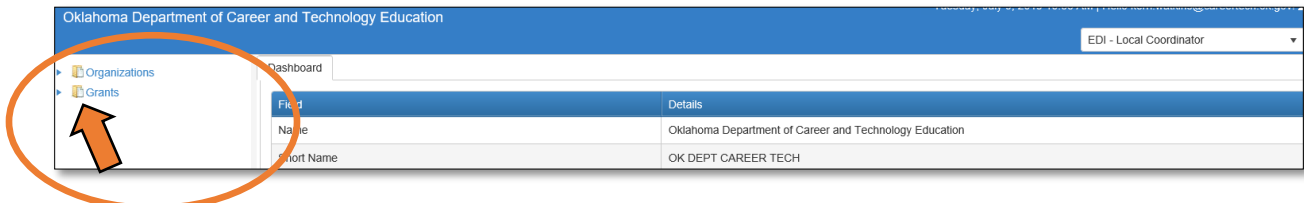
- Sign in at <https://ctims.okcareertech.org/CTBDSWeb/> using your school email and CTIMS password.

NOTE: Please log into CTIMS using **Internet Explorer**  **version 11 or higher** or **Microsoft Edge** . CTIMS is currently not compatible with other browsers.

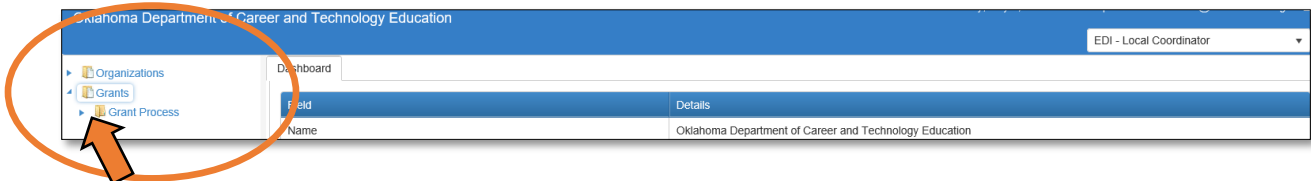
- Verify that you are signed in with the appropriate role in the top right-hand corner. Use the drop-down arrow to select your EDI role.



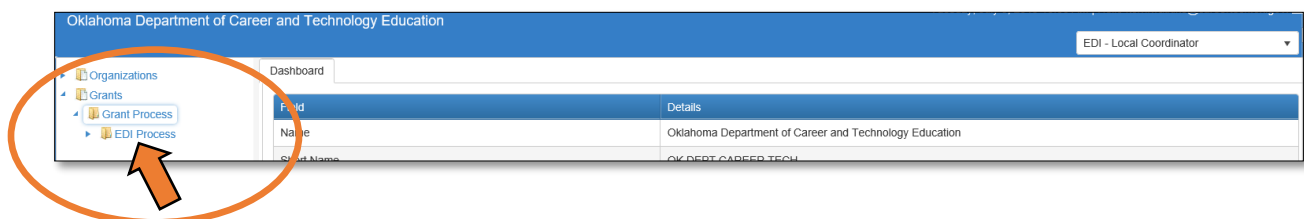
- Click the arrow |▶ next to **Grants** on left navigation.



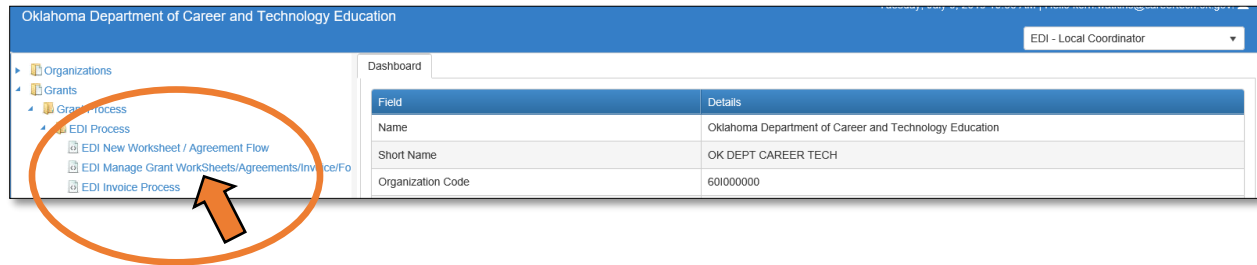
- Click the arrow |▶ next to **Grant Process** on left navigation.



- Click the arrow |▶ next to **EDI Process** on left navigation.



- Select **EDI Manage Grant WorkSheets/Agreements/Invoice/Follow-up.**

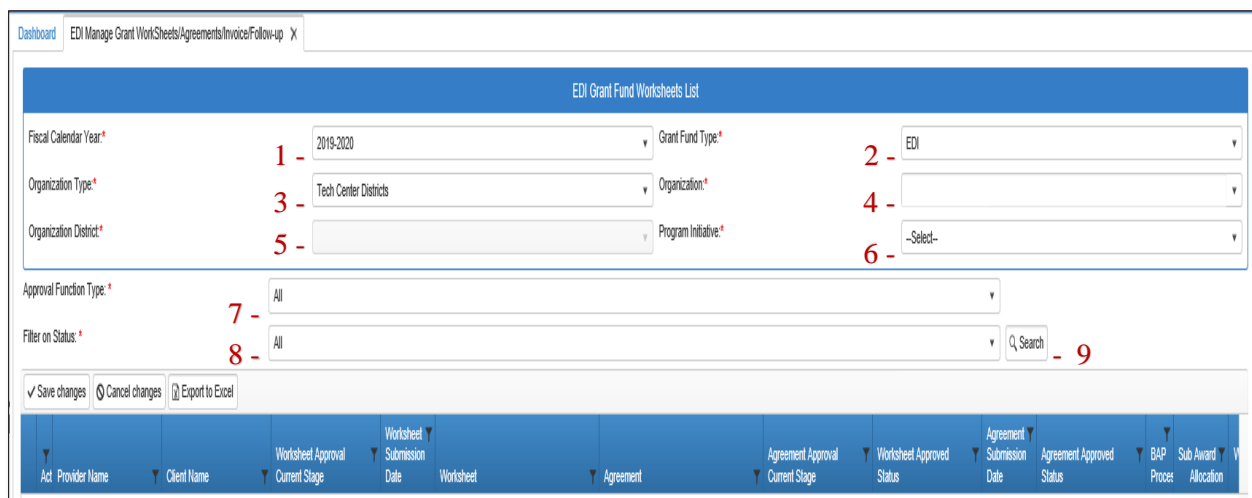


IMPORTANT: Do not select the EDI New Worksheet/Agreement Flow option on the left navigation. This will start a completely new worksheet.

Opening the Agreement

1. Verify **Fiscal Calendar Year*** to make sure correct year is showing.
2. Verify **Grant Fund Type*** is set to EDI.
3. Select your correct **Organization Type** from the drop-down menu.
4. Select your **Organization*** by typing in the first three characters of the name.
5. Verify the **Organization District*** if it does not automatically appear after typing the first three letters of your Organization name or if you need to select a different Organization District.
6. Select a **Program Initiative***.
7. **Approval Function Type** will remain as **All**.
8. **Filter on Status** will remain as **All**.
9. Select the **Search** button to search for any outstanding worksheets/applications that need your approval.

NOTE: A red asterisk (*) indicates a required field.



1.1 - After clicking the **Search** button, the agreement column will display an agreement number. Select the agreement by clicking on the **Agreement Number**. This is a link that will open the agreement.

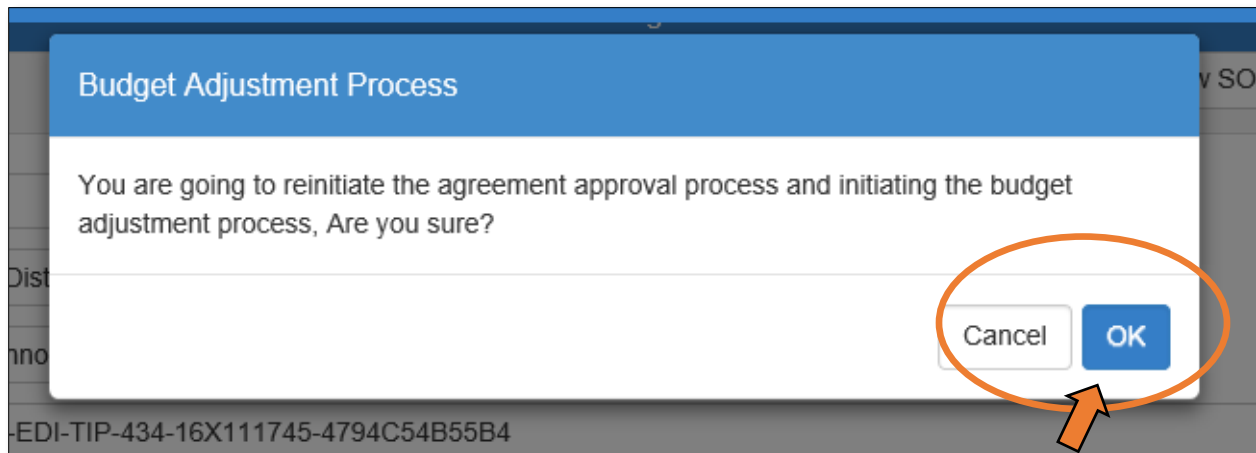
The screenshot shows the 'EDI Grant Fund Worksheets List' interface. It includes a search bar with various filters and a table of results. The 'Agreement' column in the table contains a link that is highlighted with an orange circle and an arrow.

Initiating the Budget Adjustment

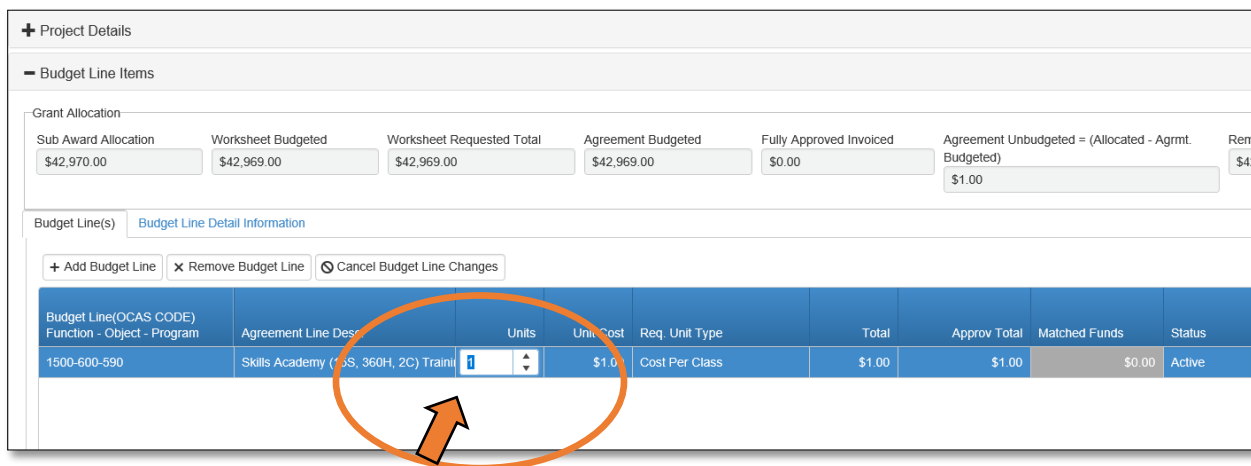
2.1 - At the bottom right corner of the **EDI Grant Agreement** screen, click **Budget Adjustment Process**.

The screenshot shows the 'EDI Grant Agreement' screen. It features a summary of the agreement with various sections. At the bottom right, there is a button labeled 'Budget Adjustment Process' which is highlighted with an orange circle and an arrow.

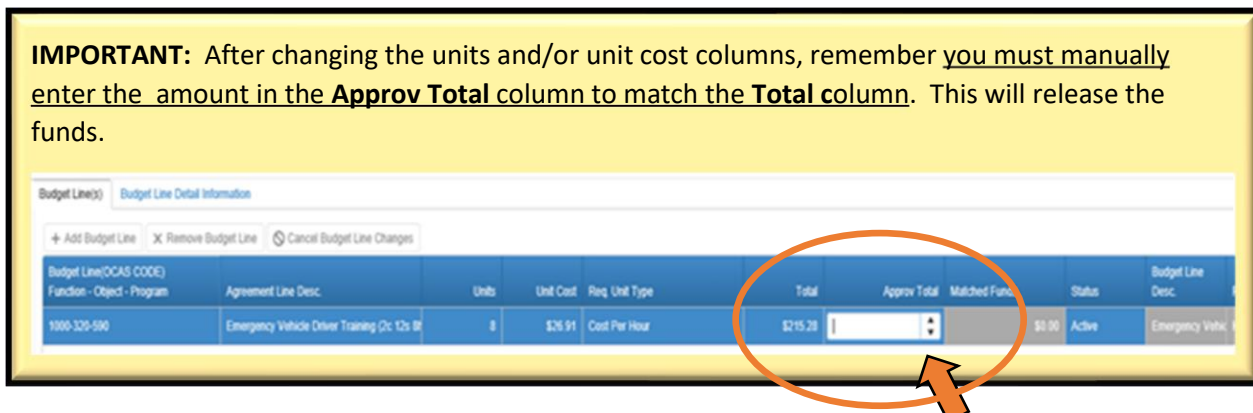
2.2 - You will be asked to confirm that you are reinitiating the agreement approval process. Click **OK**.



2.3 - In the **Budget Line Items** section, make the necessary changes to the budget line item by clicking in the appropriate columns. For example, click in the Units column to change the number of units.

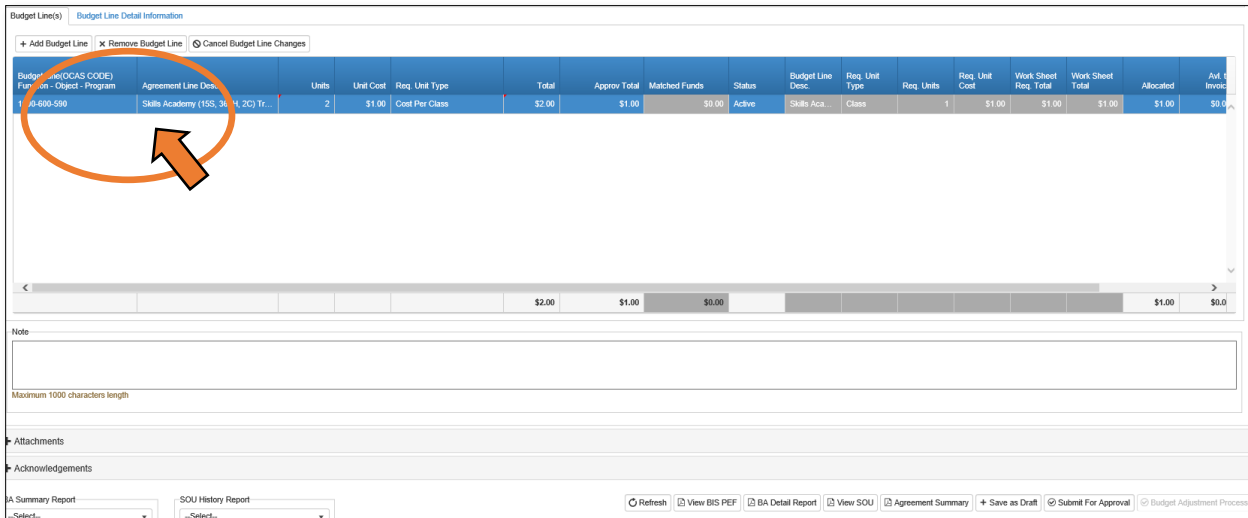


IMPORTANT: After changing the units and/or unit cost columns, remember you must manually enter the amount in the **Approv Total** column to match the **Total** column. This will release the funds.



NOTE: Once the changes, or partial changes have been made, you can Save as Draft by clicking **Save as Draft** at the bottom of the **EDI Grant Agreement** screen. This will save the changes to the agreement without summing to the next approval stage, so you can return and finish at a later time.

2.4 - When all adjustments have been made and you are ready to send to the next approval stage, add the approval note in the Note field below the budget line items.



Budget Line(s) Budget Line Detail Information

+ Add Budget Line X Remove Budget Line Cancel Budget Line Changes

| Budget Line (CDS CODE) | Function - Object - Program | Agreement Line Description | Units | Unit Cost | Req Unit Type | Total | Approved Total | Matched Funds | Status | Budget Line Description | Req Unit Type | Req Units | Req Unit Cost | Work Sheet Req Total | Work Sheet Total | Allocated | Ad. & Invs |
|------------------------|-----------------------------|------------------------------------|-------|-----------|----------------|--------|----------------|---------------|--------|-------------------------|---------------|-----------|---------------|----------------------|------------------|-----------|------------|
| 1 40-400-500 | | Skills Academy (155, 34-4, 2C) Tr. | 2 | \$1.00 | Cost Per Class | \$2.00 | \$1.00 | \$0.00 | Active | Skills Aca. | Class | 1 | \$1.00 | \$1.00 | \$1.00 | \$1.00 | \$0.00 |

Note

Maximum 1000 characters length

Attachments

Acknowledgements

IA Summary Report Select... SOU History Report Select...

Refresh View BIS PEF BA Detail Report View SOU Agreement Summary + Save as Draft Submit For Approval Budget Adjustment Process

Acknowledgements and Approval

3.1 - Next, expand the **Acknowledgments** section by clicking on the +(plus) sign. Add your **Budget Adjustment Justification Note** and **Acknowledgement Note** (These fields are required. You can add your initials if you do not have a note to add.), then click the box to verify that the information provided is accurate and complete. Now, select **Submit for Approval**.

The screenshot shows a web form titled "Attachments" with a sub-section "Acknowledgements". Inside "Acknowledgements", there is a "Budget Adjustment Justification Note" field with a rich text editor toolbar. Below this is a checkbox labeled "By checking this box, I certify that the information provided is accurate and complete." which is circled in orange. Underneath the checkbox is an "Acknowledgement Note" field with a rich text editor toolbar. A yellow callout box points to this field with the text: "Add note here. If you do not have a note to add, type your initials. This field is required." At the bottom right of the form, there is a row of buttons: "Refresh", "View BIS PEF", "BA Detail Report", "View SOU", "Agreement Summary", "Save as Draft", "Submit For Approval" (circled in orange), and "Budget Adjustment Process".

The agreement will go back through the Agreement approval process.

Releasing Funds

If a project has completed and not all funds are used, you can release the funds to be used for another project. For example, you can release funds for a fire fighter program to be used for another fire fighter program training project.

- In the Agreement, you will do a budget adjustment. Once the budget adjustment is fully approved, the funds will be released and you can begin a new Worksheet for the new training.
- If you have a line item that has not been used and need to release the funds to be used for another project, you will make that line item inactive.

For complete instructions to release funds, go to the Releasing Unused Funds section of the guidebook [here](#).

Invoice Process

*career***tech**

Invoice Process Flow

- All enrollments must be uploaded to CTIMS before the invoice process can be initiated.
- Verify you have all supporting documents before submitting an invoice for approval. For more information on funding and reimbursement, please refer to the **Invoicing Checklist** on page 12 of the BIS Guidelines FY21.
<https://www.okcareertech.org/about/state-agency/divisions/imd/ctims>

IMPORTANT: If you have started an invoice and realize you need to do a budget adjustment in the Agreement, you must make the current invoice inactive, then begin the budget adjustment process. For information on the budget adjustment process, see instructions [here](#).

****Contact the regional coordinator prior to initiating a budget adjustment****

Roles: Invoice Process

The roles represent the stages required in CTIMS for the submission of an invoice.

Stage 1 - Local Coordinator – After training is complete, the EDI Local Coordinator initiates the invoice process.



Stage 2 - Local BIS Director – Reviews and approves invoice line items and attachments.



Stage 3 - Local Finance Coordinator - Reviews and approves invoice line items and attachments.



Stage 4 - State Regional Coordinator - Reviews and approves invoice line items and attachments.



Stage 5 - State Requisition Coordinator - Verifies the invoice line items and documentation, prints the documentation, and delivers to the finance department.



Stage 6 - ODCTE EDI Finance Reviewer - Reviews and approves the invoice line items and documentation. The invoice becomes fully approved. Pays the claim.

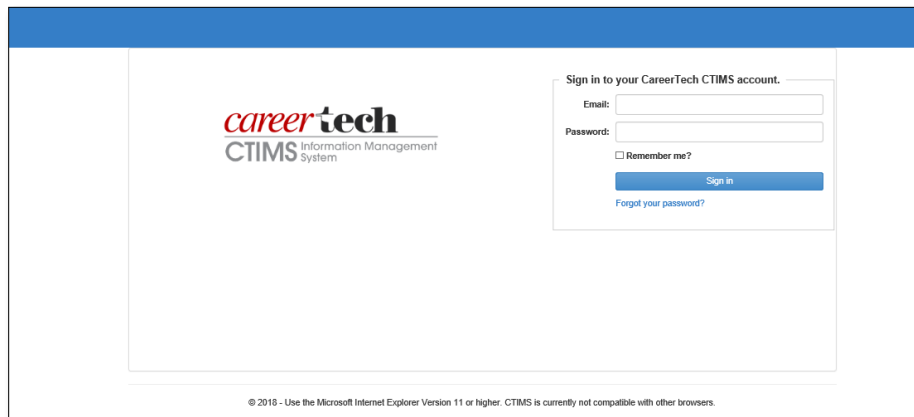
Local Coordinator

Accessing the Invoice

After training is complete, the **EDI Local Coordinator** starts the **EDI Invoice Process**.

IMPORTANT: Before initiating an invoice, all Budget Adjustments must be fully approved.


- Sign in at <https://ctims.okcareertech.org/CTBDSWeb/> using your school email and CTIMS password.

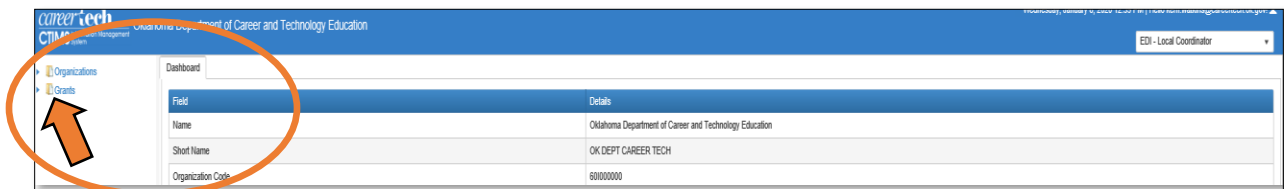


IMPORTANT: Please log into CTIMS using Internet Explorer  version 11 or higher or Microsoft Edge . CTIMS is currently not compatible with other browsers.

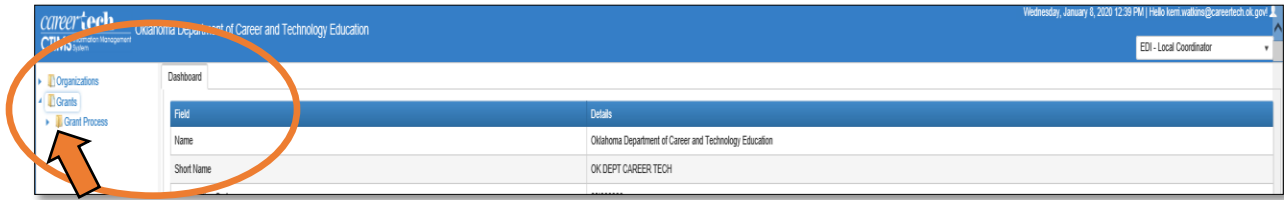
- Verify that you are signed in with the role of an **EDI Local Coordinator**. In the top right corner. Use the drop-down arrow to select this role.



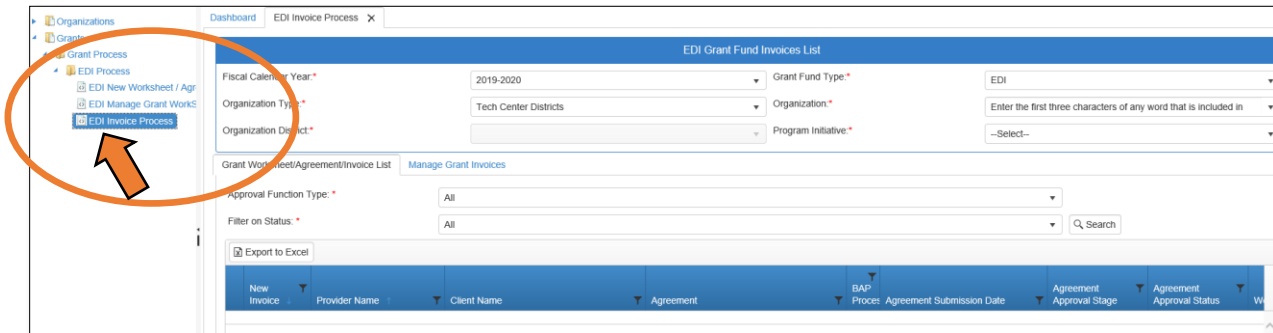
- Click the arrow  next to **Grants** on left navigation.



- Click the arrow | ► next to **Grant Process** on left navigation.



- Select the **EDI Invoice Process**.



Creating a New Invoice

Complete the **EDI Grant Fund Invoices List** form. The tagged numbers on the screenshot correspond to the instruction steps below.

1. Verify **Fiscal Calendar Year***.
2. Verify **Grant Fund Type** is set to **EDI***.
3. Select your correct **Organization Type** from the drop-down menu. This should default to Tech Center Districts.
4. Select your **Organization** by typing in the first three characters of the name.
5. Verify the **Organization District***.
6. Select a **Program Initiative***.
7. **Approval Function Type** will remain as **All**.
8. **Filter on Status** will remain as **All**.
9. Select the **Search** button to search for any outstanding invoices that need your approval.

NOTE: A red asterisk (*) indicates a required field.

The screenshot shows the 'EDI Grant Fund Invoices List' form. It includes several dropdown menus and a search button, each with a red number tag indicating a step from the instructions:

- 1 -** Fiscal Calendar Year* (dropdown menu)
- 2 -** Grant Fund Type* (dropdown menu, set to EDI)
- 3 -** Organization Type* (dropdown menu, set to Tech Center Districts)
- 4 -** Organization* (text input field)
- 5 -** Organization District* (dropdown menu)
- 6 -** Program Initiative* (dropdown menu)
- 7 -** Approval Function Type* (dropdown menu, set to All)
- 8 -** Filter on Status* (dropdown menu, set to All)
- 9** Search button

Below the form is a table with columns for New Invoice, Provider Name, Client Name, Agreement, BAP Process, Agreement Submission Date, Agreement Approval Stage, Agreement Approval Status, Worksheet, Worksheet Submission Date, Worksheet Stage, Worksheet Status, and Sub Award Allocation. An 'Export to Excel' button is also visible.

- After clicking the **Search** button, select **New Invoice** to start a new invoice.

Dashboard | EDI Invoice Process X

EDI Grant Fund Invoices List

Fiscal Calendar Year: 2019-2020 | Grant Fund Type: EDI

Organization Type: Tech Center Districts | Organization: Sample Technology Center

Organization District: Sample Technology Center | Program Initiative: Economic Development - Firefighter (Type 83) -444

Grant Worksheet/Agreement/Invoice List | Manage Grant Invoices

Approval Function Type: All | Filter on Status: All | Search

Export to Excel

| New Invoice | Provider Name | Client Name | Agreement | BAP Price | Agreement Submission Date | Agreement Approval Stage | Agreement Approval Status | Worksheet | Worksheet Submission Date | Worksheet Stage | Worksheet Status | Sub Award Allocation |
|--------------------|-------------------|---------------------|------------------------------------|-----------|---------------------------|--------------------------|---------------------------|--------------------|---------------------------|----------------------|------------------|----------------------|
| New Invoice | Sample Technology | Sample Organization | WSAG-1920-EDI-EDI-FIREFTR-444-07X1 | No | 09/06/2019 15:36:19 | EDI Local Finance... | Fully Approved | WS-1920-EDI-EDI... | 08/05/201... | EDI State Supervi... | Fully Approved | \$63,038.00 |
| New Invoice | Sample Technology | Sample Organization | WSAG-1920-EDI-EDI-FIREFTR-444-07X1 | No | 09/06/2019 15:35:14 | EDI Local Finance... | Fully Approved | WS-1920-EDI-EDI... | 08/14/201... | EDI State Supervi... | Fully Approved | \$63,038.00 |
| New Invoice | Sample Technology | Sample Organization | | No | | New-Draft | | WS-1920-EDI-EDI... | | New-Draft | | \$63,038.00 |

IMPORTANT: If you have already created an invoice for the project, do not click on New Invoice. Follow the instructions for opening and existing invoice [here](#).

- On the **EDI Grant Submit Invoice-Step 1** screen, click **Save & Next**.

Dashboard | EDI Invoice Process X | New Invoice X

EDI Grant Submit Invoice - Step 1

Provider Organization Details

Fiscal Calendar Year: 2019-2020 | Grant Fund Type: EDI

Organization Type: Tech Center Districts | Organization: Sample Technology Center

Organization District: Sample Technology Center | Program Initiative: Economic Development - Firefighter (Type 83) -444

Worksheet No: WS-1920-EDI-EDI-FIREFTR-444-07X111745-98A50C7B8343

Agreement No: WSAG-1920-EDI-EDI-FIREFTR-444-07X111745-183FD46EBFF6

Invoice No: INV-1920-EDI-EDI-FIREFTR-444-07X111745-2C742F7233ED

Basic Client Information

Project Details

Refresh | Save & Next

- On the **EDI Grant Submit Invoice-Step 2** screen, the **Invoice Line Items** section should automatically expand.
- Select the budget line item you want to invoice by clicking on the checkbox next to the line item. This will add a check mark in the box next to that line item. Multiple invoice line items can be checked to invoice on one invoice.

NOTE: To check all invoice line items at once, click the check box in the column header.

| Agreement Line Desc. | Budget Line(OCAS CODE) Function - Object - Program | OCAS Description | Units | Unit Cost | Req. Unit Type | Matched Funds | Total | Approv Total |
|---|--|---|-------|-----------|------------------|---------------|------------|--------------|
| <input type="checkbox"/> Structural Firefighter (19s 7c 8h) | 1000-100-590 | 1000-Personnel Services - Salaries-100-Personnel... | 19.00 | \$250.00 | Cost Per Student | \$0.00 | \$4,750.00 | \$4,750.00 |
| <input type="checkbox"/> Excelsior | 1000-100-590 | 1000-Personnel Services - Salaries-100-Personnel... | 1.00 | \$250.00 | Cost Per Class | \$0.00 | \$250.00 | \$250.00 |

- If you will be invoicing for only part of a line item, click on the ► next to the line item to expand the details.

| Agreement Line Desc. | Budget Line(OCAS CODE) Function - Object - Program | OCAS Description | Units | Unit Cost | Req. Unit Type | Matched Funds | Total | Approv Total |
|---|--|---|-------|-----------|------------------|---------------|------------|--------------|
| ► <input type="checkbox"/> Structural Firefighter (19s 7c 8h) | 1000-100-590 | 1000-Personnel Services - Salaries-100-Personnel... | 19.00 | \$250.00 | Cost Per Student | \$0.00 | \$4,750.00 | \$4,750.00 |
| ► <input type="checkbox"/> Excelsior | 1000-100-590 | 1000-Personnel Services - Salaries-100-Personnel... | 1.00 | \$250.00 | Cost Per Class | \$0.00 | \$250.00 | \$250.00 |

- To revise the budget line item, click the **Edit** button.

Invoice Line Items

| Agreement Line Desc. | Budget Line(OCAS CODE) Function - Object - Program | OCAS Description | Units | Unit Cost | Req. Unit Type | Matched Funds | Total | Approv Total | Av |
|---------------------------------------|---|---|-------|-----------|------------------|---------------|------------|--------------|----|
| Structural Firefighter (19s 7c 8h)... | 1000-100-590 | 1000-Personnel Services - Salaries-100-Personnel... | 19.00 | \$250.00 | Cost Per Student | \$0.00 | \$4,750.00 | \$4,750.00 | |

+ Add Invoice

| Is Active | Invoice Line Desc. | Budget Line(OCAS CODE) Function - Object - Program | Units | Unit Cost | Req. Unit Type | Matched Funds | Total | Total To Be Invoiced | Date Of E |
|-----------|-----------------------------------|---|-------|-----------|------------------|---------------|------------|----------------------|-----------|
| Active | Structural Firefighter (19s 7c... | 1000-100-590 | 19.00 | \$250.00 | Cost Per Student | \$0.00 | \$4,750.00 | \$4,750.00 | |

Edit

- Make the necessary changes to the **Units**, **Unit Cost**, and/or **Req. Unit Type** fields by clicking in the space and typing or use the arrows on each field. This will update the **Total to be Invoiced** column.

Invoice Line Items

| Agreement Line Desc. | Budget Line(OCAS CODE) Function - Object - Program | OCAS Description | Units | Unit Cost | Req. Unit Type | Matched Funds | Total | Approv Total | Av |
|---------------------------------------|---|---|-------|-----------|------------------|---------------|-------|--------------|----|
| Structural Firefighter (19s 7c 8h)... | 1000-100-590 | 1000-Personnel Services - Salaries-100-Personnel... | 18.00 | 250.00 | Cost Per Student | 0.00 | 4500 | 4500 | |

+ Add Invoice

| Is Active | Invoice Line Desc. | Budget Line(OCAS CODE) Function - Object - Program | Units | Unit Cost | Req. Unit Type | Matched Funds | Total | Total To Be Invoiced | Date Of E |
|-----------|-----------------------------------|---|-------|-----------|------------------|---------------|-------|----------------------|-----------|
| Active | Structural Firefighter (19s 7c... | 1000-100-590 | 18.00 | 250.00 | Cost Per Student | 0.00 | 4500 | 4500 | |

Update **Cancel**

- Once the necessary adjustments have been made, click the **Update** button.

| Agreement Line Desc. | Budget Line(OCAS CODE) Function - Object - Program | OCAS Description | Units | Unit Cost | Req. Unit Type | Matched Funds | Total | Approv Total | Aut. to Invoice | Current Line Invoiced | Total Invoiced | Worksheet Budget Line Desc. |
|--------------------------------------|---|--|-------|-----------|----------------|---------------|----------|--------------|-----------------|-----------------------|----------------|--------------------------------------|
| Emergency Vehicle Driver Training... | 1000-320-590 | 1000-Professional Education Services-320-Professional... | 18.00 | \$43.08 | Cost Per Hour | \$0.00 | \$688.08 | \$688.08 | \$473.68 | \$0.00 | \$215.28 | Emergency Vehicle Driver Training... |

+ Add Invoice

| Is Active | Invoice Line Desc. | Budget Line(OCAS CODE) Function - Object - Program | Units | Unit Cost | Req. Unit Type | Matched Funds | Total | Total To Be Invoiced | Date Of Expense | Serial Number | Local Reference |
|-----------|--------------------------------------|---|-------|-----------|----------------|---------------|--------|----------------------|-----------------|---------------|-----------------|
| Active | Emergency Vehicle Driver Training... | 1000-320-590 | 1.00 | 473.68 | Cost Per Hour | 0.00 | 473.68 | 473.68 | | | |

Update **Cancel**

- Expand the Attachments section by clicking on the +(plus) sign next to **Attachments**.

The screenshot shows the 'Invoice Line Items' section of a software interface. Below the table, there are two expandable sections: '+ Attachments' and '+ Acknowledgements'. The '+ Attachments' section is circled in orange, and an orange arrow points to the plus sign next to it. The interface includes various tabs at the top like 'Provider Organization Details', 'Basic Client Information', 'Project Details', 'Grant Allocation', and 'Invoice Line Items'. At the bottom, there are navigation buttons: 'Refresh', 'View BIS PEF', 'View SOU', 'Invoice Summary', 'One Step Back', 'Save as Draft', and 'Submit For Approval'.

| Agreement Line Desc. | Budget Line (OCAS CODE) Function - Object - Program | OCAS Description | Units | Unit Cost | Req. Unit Type | Matched Funds | Total | Approv. Total | Avail. to Invoice | Current Line Invoiced | Total Invoiced | Worksheet Budget Line Desc. |
|---------------------------------|---|---|-------|------------|----------------|---------------|------------|---------------|-------------------|-----------------------|----------------|---------------------------------|
| Flashover (10s 2c 8h) 9/14 &... | 1000-100-590 | 1000-Personnel Services - Salaries-100-Perso... | 1.00 | \$1,000.00 | Cost Per Class | \$0.00 | \$1,000.00 | \$1,000.00 | \$1,000.00 | \$0.00 | \$0.00 | Flashover (10s 2c 8h) 9/14 &... |
| Wildland Backfiring Operatio... | 1000-100-590 | 1000-Personnel Services - Salaries-100-Perso... | 1.00 | \$250.00 | Cost Per Class | \$0.00 | \$250.00 | \$250.00 | \$250.00 | \$0.00 | \$0.00 | Wildland Backfiring Operatio... |
| NIMS 300 (16S 1C 16 H) 9/1... | 1000-100-590 | 1000-Personnel Services - Salaries-100-Perso... | 1.00 | \$850.00 | Cost Per Class | \$0.00 | \$850.00 | \$850.00 | \$850.00 | \$0.00 | \$0.00 | NIMS 300 (16S 1C 16 H) 9/1... |
| NIMS 400 (16s 1c 16h) 9/21... | 1000-100-590 | 1000-Personnel Services - Salaries-100-Perso... | 1.00 | \$850.00 | Cost Per Class | \$0.00 | \$850.00 | \$850.00 | \$850.00 | \$0.00 | \$0.00 | NIMS 400 (16s 1c 16h) 9/21... |
| | | | | | | \$0.00 | \$2,950.00 | \$2,950.00 | \$2,950.00 | \$0.00 | \$0.00 | |

NOTE: Refer to page 12 of the BIS Guidelines for invoicing requirements.

IMPORTANT: Invoice line items and attached supporting documents must match. All attachments must be uploaded in one pdf.

2.4 –

1. Click **Browse** to locate the files on your computer.
2. Select **Upload and Save File** to attach the file.
 - A message box will say you have successfully uploaded the file. Close this box.

OKLAHOMA DEPARTMENT OF CAREER TECH EDUCATION

FLA-Local Finance Coordinator

+ Basic Client Information

+ Project Details

+ Grant Allocation

+ Invoice Line Items

- Attachments

Browse: 1 - -2

Attachment Note:

Add note here for extenuating circumstances related to the line items or attachments.

Active/inactive file(s) Download all files

| File Name | Date | Note | Action | Detail Status |
|-----------|------|------|--------|---------------|
|-----------|------|------|--------|---------------|

+ Acknowledgements

Invoice Summary One Step Back Save as Draft Submit For Approval

2.5 - Go to the **Acknowledgements** tab by clicking on the **+(plus)** sign to expand this section. Check the required acknowledgment box. Type an acknowledgment note in the box. Any extenuating circumstances related to the line item or attachment should be added here with detail. If you don't have a note to add, type your initials, as this field is required. Then, click the **Submit for Approval** button.

Oklahoma Department of Career and Technology Education

EDI- Local BIS Coordinator

Grants

Grant Process

EDI Process

EDI New Worksheet / Agr

EDI Manage Grant Works

EDI Invoice Process

+ Basic Client Information

+ Project Details

+ Grant Allocation

+ Invoice Line Items

+ Attachments

- Acknowledgements

☒ By checking this box, I certify that the information provided is accurate and complete.

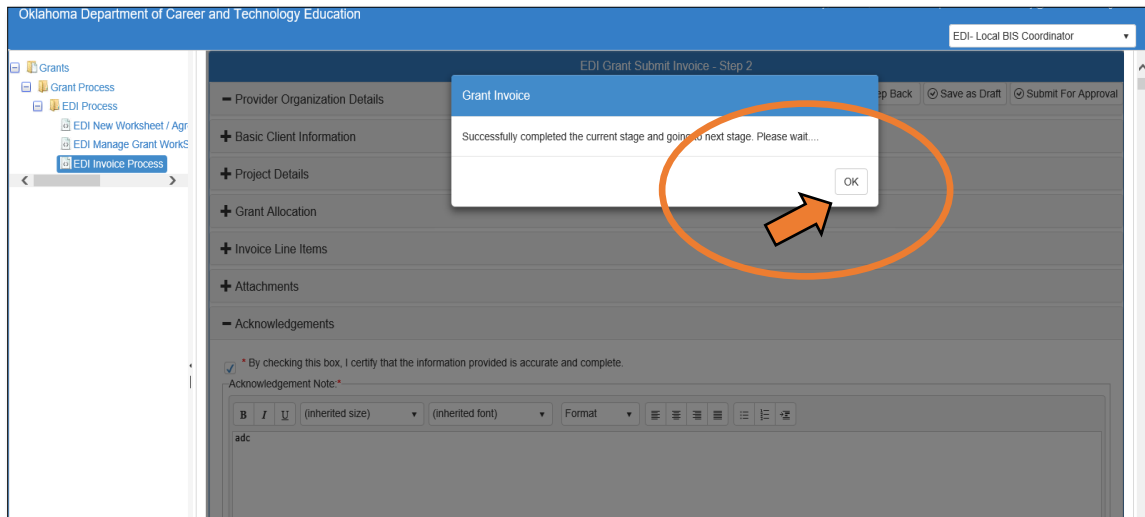
Acknowledgement Note *

Add note here. If you do not have a note to add, type your initials. This field is required.

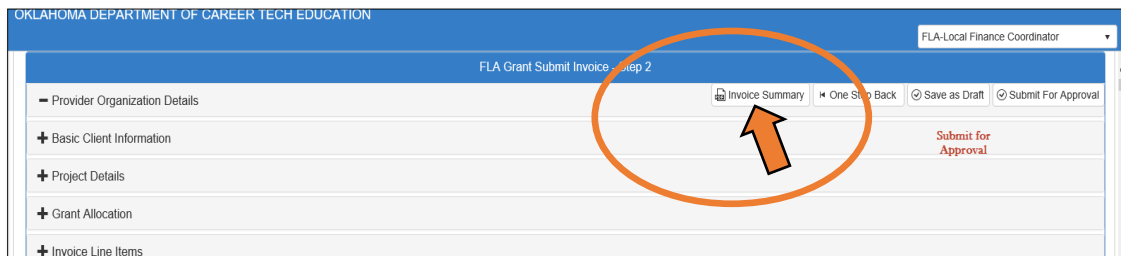
Refresh View SOU Invoice Summary One Step Back Save as Draft **Submit For Approval**


NOTE: If you are not finished with the invoice, you can select **Save as Draft** and return at a later time to make changes, then submit for approval.

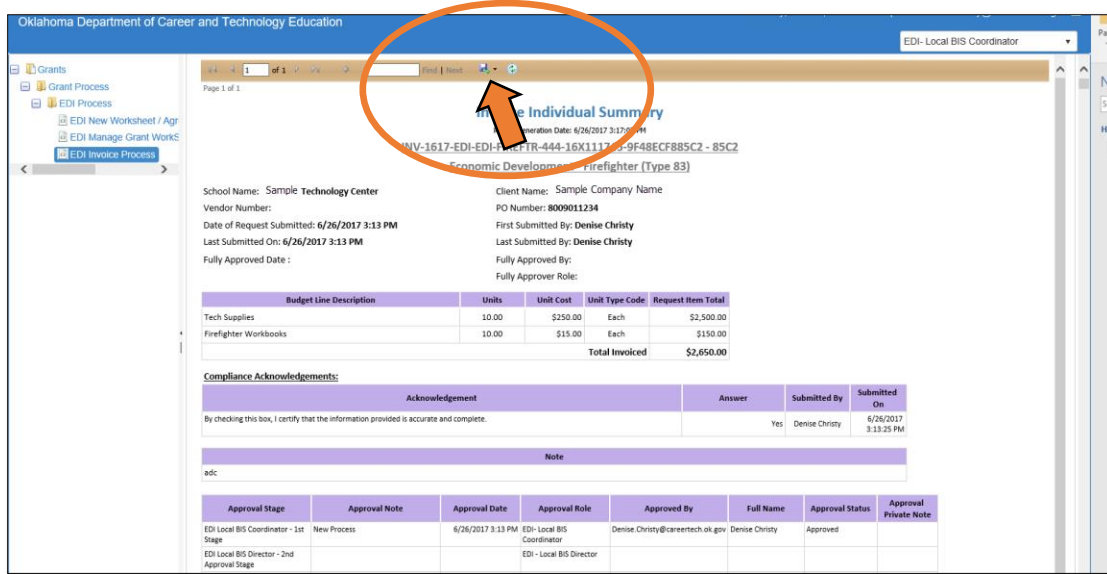
2.5 – A message will pop-up to let you know that you have successfully submitted the invoice to the next approval stage. Click **OK**.



2.6 - Go to the **Invoice Summary** tab to print or save a pdf report of the claim you have submitted.



2.7 - Click on the  symbol to download a pdf of your invoice summary.



Oklahoma Department of Career and Technology Education

EDI - Local BIS Coordinator

Grants

Grant Process

EDI Process

EDI New Worksheet / Agr

EDI Manage Grant WorkS

EDI Invoice Process

Page 1 of 1

Individual Summary

Generation Date: 6/26/2017 3:13 PM

INV-1617-EDI-EDI-TR-444-16X1117-9F48ECF885C2 - 85C2

Economic Development - Firefighter (Type 83)

School Name: Sample Technology Center

Client Name: Sample Company Name

Vendor Number:

PO Number: 8009011234

Date of Request Submitted: 6/26/2017 3:13 PM

First Submitted By: Denise Christy

Last Submitted On: 6/26/2017 3:13 PM

Last Submitted By: Denise Christy

Fully Approved Date:

Fully Approved By:

Fully Approver Role:

| Budget Line Description | Units | Unit Cost | Unit Type Code | Request Item Total |
|-------------------------|-------|-----------|----------------|--------------------|
| Tech Supplies | 10.00 | \$250.00 | Each | \$2,500.00 |
| Firefighter Workbooks | 10.00 | \$15.00 | Each | \$150.00 |
| Total Invoiced | | | | \$2,650.00 |

Compliance Acknowledgements:

| Acknowledgement | Answer | Submitted By | Submitted On |
|---|--------|----------------|----------------------|
| By checking this box, I certify that the information provided is accurate and complete. | Yes | Denise Christy | 6/26/2017 3:13:25 PM |

Note

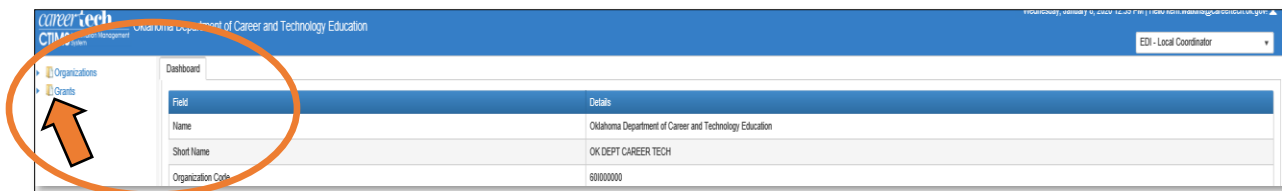
adc

| Approval Stage | Approval Note | Approval Date | Approval Role | Approved By | Full Name | Approval Status | Approval Private Note |
|---|---------------|-------------------|-----------------------------|----------------------------------|----------------|-----------------|-----------------------|
| EDI Local BIS Coordinator - 1st Stage | New Process | 6/26/2017 3:13 PM | EDI - Local BIS Coordinator | Denise Christy@careertech.ok.gov | Denise Christy | Approved | |
| EDI Local BIS Director - 2nd Approval Stage | | | EDI - Local BIS Director | | | | |

The invoice has been successfully submitted and will go to the **EDI Local BIS Director**.

Opening an Existing Invoice for Submission

- Click the arrow | ► next to **Grants** on left navigation.



career tech
OK-CTE

Oklahoma Department of Career and Technology Education

EDI - Local Coordinator

Dashboard

Field

Name

Short Name

Organization Code

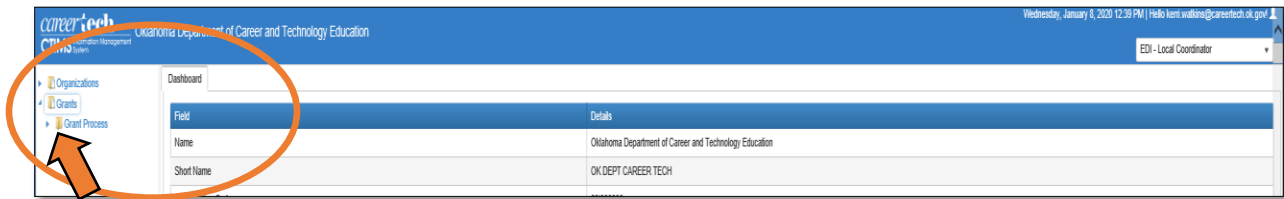
Details

Oklahoma Department of Career and Technology Education

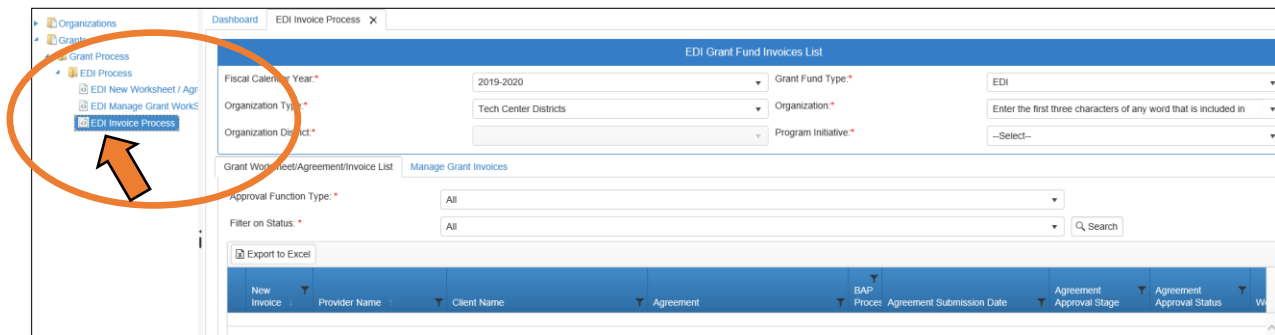
OK DEPT CAREER TECH

600000000

- Click the arrow |▶ next to **Grant Process** on left navigation.



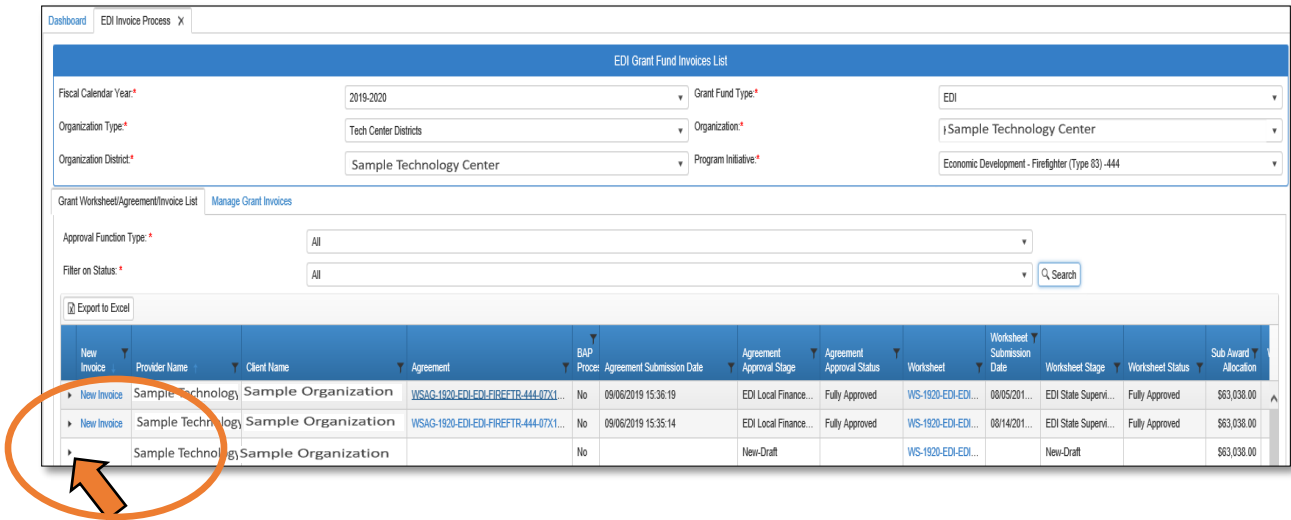
- Select the **EDI Invoice Process**.



- To open an invoice that has already been started, but not submitted for approval, click on the **Manage Grant Invoices** tab.



NOTE: To view the approval status of an invoice already submitted for approval, click the ► sign next to the invoice to expand that section and view details.



Dashboard | EDI Invoice Process X

EDI Grant Fund Invoices List

Fiscal Calendar Year* 2019-2020 Grant Fund Type* EDI

Organization Type* Tech Center Districts Organization* Sample Technology Center

Organization District* Sample Technology Center Program Initiative* Economic Development - Firefighter (Type 83) -444

Grant Worksheet/Agreement/Invoice List Manage Grant Invoices

Approval Function Type* All

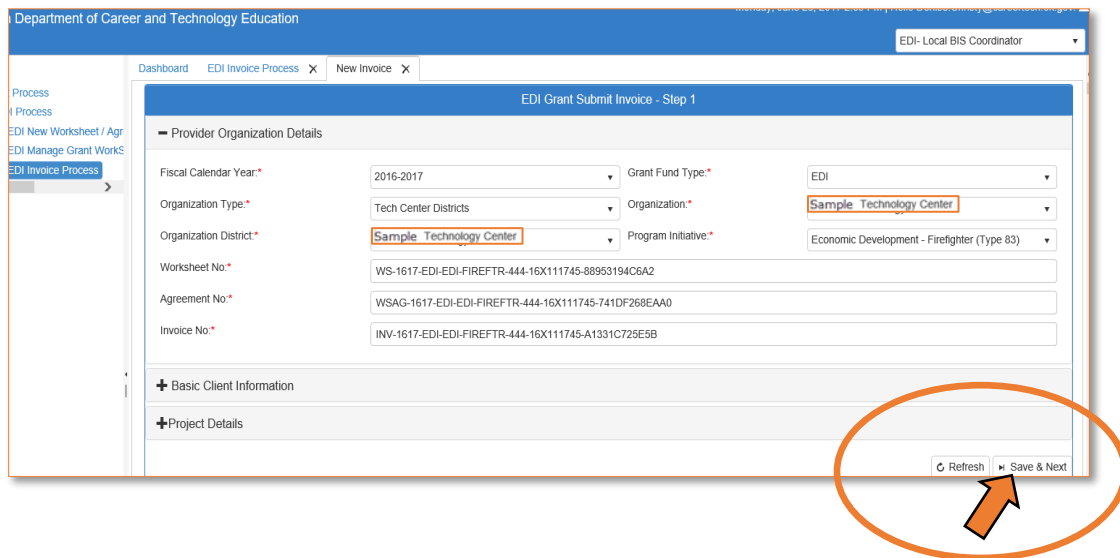
Filter on Status* All Search

Export to Excel

| New Invoice | Provider Name | Client Name | Agreement | BAP Process | Agreement Submission Date | Agreement Approval Stage | Agreement Approval Status | Worksheet | Worksheet Submission Date | Worksheet Stage | Worksheet Status | Sub Award Allocation |
|---------------|-------------------|---------------------|---------------------------------------|-------------|---------------------------|--------------------------|---------------------------|--------------------|---------------------------|----------------------|------------------|----------------------|
| ► New Invoice | Sample Technology | Sample Organization | WSAG-1920-EDI-EDI-FIREFTR-444-97X1... | No | 09/06/2019 15:36:19 | EDI Local Finance... | Fully Approved | WS-1920-EDI-EDI... | 08/05/201... | EDI State Supervi... | Fully Approved | \$63,038.00 |
| ► New Invoice | Sample Technology | Sample Organization | WSAG-1920-EDI-EDI-FIREFTR-444-97X1... | No | 09/06/2019 15:35:14 | EDI Local Finance... | Fully Approved | WS-1920-EDI-EDI... | 08/14/201... | EDI State Supervi... | Fully Approved | \$63,038.00 |
| ► | Sample Technology | Sample Organization | | No | | New-Draft | | WS-1920-EDI-EDI... | | New-Draft | | \$63,038.00 |

EDI Grant Submit Invoice - Step 1

1.1 - Verify that the information is correct, then select **Save & Next** to continue to the next screen.



Department of Career and Technology Education

Dashboard | EDI Invoice Process X | New Invoice X

EDI Grant Submit Invoice - Step 1

Provider Organization Details

Fiscal Calendar Year* 2016-2017 Grant Fund Type* EDI

Organization Type* Tech Center Districts Organization* Sample Technology Center

Organization District* Sample Technology Center Program Initiative* Economic Development - Firefighter (Type 83)

Worksheet No.* WS-1617-EDI-EDI-FIREFTR-444-16X111745-88953194C6A2

Agreement No.* WSAG-1617-EDI-EDI-FIREFTR-444-16X111745-741DF268EAA0

Invoice No.* INV-1617-EDI-EDI-FIREFTR-444-16X111745-A1331C725E5B

+ Basic Client Information

+ Project Details

Refresh Save & Next

EDI Grant Submit Invoice - Step 2

2.1 - Under the **Invoice Line Items** section, select the budget line item you want to invoice by clicking on the checkbox next to the line item. This will add a check mark in the box next to that line item. Multiple invoice line items can be checked to invoice on one invoice.

Dashboard

EDI Invoice Process

New Invoice

EDI Grant Submit Invoice - Step 2

Provider Organization Details

Basic Client Information

Project Details

Grant Allocation

Invoice Line Items

Refresh

View BIS PEF

View SOU

Invoice Summary

One Step Back

Save as Draft

Submit For Approval

| Agreement Line Desc. | Budget Line (OCAS CODE) - Program | OCAS Description | Units | Unit Cost | Req. Unit Type | Matched Funds | Total | Approv Total | Aut. to Invoice | Current Line Invoiced | Total Invoiced | Worksheet Budget Line Desc. |
|---|-----------------------------------|---|-------|------------|----------------|---------------|------------|--------------|-----------------|-----------------------|----------------|-----------------------------------|
| <input checked="" type="checkbox"/> Flashover (10a 2c 8h) 9/14 &... | 1000-100-590 | 1000-Personnel Services - Salaries-100-Perso... | 1.00 | \$1,000.00 | Cost Per Class | \$0.00 | \$1,000.00 | \$1,000.00 | \$1,000.00 | \$0.00 | \$0.00 | Flashover (10a 2c 8h) 9/14 &... |
| <input type="checkbox"/> Backdrifting Operatio... | 1000-100-590 | 1000-Personnel Services - Salaries-100-Perso... | 1.00 | \$250.00 | Cost Per Class | \$0.00 | \$250.00 | \$250.00 | \$250.00 | \$0.00 | \$0.00 | Wildland Backdrifting Operatio... |
| <input type="checkbox"/> NIMS 300 (16S 1C 16 H) 9/1... | 1000-100-590 | 1000-Personnel Services - Salaries-100-Perso... | 1.00 | \$850.00 | Cost Per Class | \$0.00 | \$850.00 | \$850.00 | \$850.00 | \$0.00 | \$0.00 | NIMS 300 (16S 1C 16 H) 9/1... |
| <input type="checkbox"/> NIMS 400 (16a 1c 18h) 9/21... | 1000-100-590 | 1000-Personnel Services - Salaries-100-Perso... | 1.00 | \$850.00 | Cost Per Class | \$0.00 | \$850.00 | \$850.00 | \$850.00 | \$0.00 | \$0.00 | NIMS 400 (16a 1c 18h) 9/21... |
| | | | | | | \$0.00 | \$2,950.00 | \$2,950.00 | \$2,950.00 | \$0.00 | \$0.00 | |

Attachments

Acknowledgements

Refresh

View BIS PEF


View SOU

Invoice Summary

One Step Back

Save as Draft

Submit For Approval

2.2 - Click the  next to the line item to be invoiced, then click the **Edit** button.

- You will be able to change the **Units, Unit Cost, Req.** and **Unit Type**, by clicking in each field and typing, or use the arrows to make the changes.

Invoice Line Items

| Agreement Line Desc. | Budget Line (OCAS CODE) Function - Object - Program | OCAS Description | Units | Unit Cost | Req Unit Type | Matched Funds | Total | Approv Total | Amt. to Invoice | Current Line Invoiced | Total Invoiced | Worksheet Budget Line Desc |
|---------------------------------|---|---|-------|------------|----------------|---------------|------------|--------------|-----------------|-----------------------|----------------|---------------------------------|
| Flashover (10s 2c 8h) 9/14 &... | 1000-100-590 | 1000-Personnel Services - Salaries-100-Perso... | 1.00 | \$1,000.00 | Cost Per Class | \$0.00 | \$1,000.00 | \$1,000.00 | \$1,000.00 | \$0.00 | \$0.00 | Flashover (10s 2c 8h) 9/14 &... |

+ Add Invoice

| Is Active | Invoice Line Desc. | Budget Line(OCAS CODE) Function - Object - Program | Units | Unit Cost | Req Unit Type | Matched Funds | Total | Total To Be Invoiced | Date Of Expense | Serial Number | Local Reference |
|-----------|---------------------------------|--|-------|------------|----------------|---------------|------------|----------------------|-----------------|---------------|-----------------|
| Active | Flashover (10s 2c 8h) 9/14 &... | 1000-100-590 | 1.00 | \$1,000.00 | Cost Per Class | \$0.00 | \$1,000.00 | \$1,000.00 | | | |

Edit

- Then, click the **Update** button.

The screenshot shows the 'Invoice Line Items' section of a software interface. It contains a table with columns: Agreement Line Desc., Budget Line (OCAS CODE) Function - Object - Program, OCAS Description, Units, Unit Cost, Req. Unit Type, Matched Funds, Total, Approv Total, Amt. to Invoice, Current Line Invoiced, Total Invoiced, and Worksheet Budget Line Desc. The first row is selected. Below the table, there is a '+ Add Invoice' button and a table with columns: Is Active, Invoice Line Desc., Budget Line (OCAS CODE) Function - Object - Program, Units, Unit Cost, Req. Unit Type, Matched Funds, Total, Total To Be Invoiced, Date Of Expense, Serial Number, and Local Reference. The 'Update' button is circled in orange, and an orange arrow points to it.

- Use your scroll wheel on your mouse to scroll to the Attachments section. Expand the Attachments section by clicking on the +(plus) sign next to **Attachments**.

The screenshot shows the 'Provider Organization Details' section of a software interface. It contains several sections: Basic Client Information, Project Details, Grant Allocation, and Invoice Line Items. The 'Invoice Line Items' section is expanded, showing a table with columns: Agreement Line Desc., Budget Line (OCAS CODE) Function - Object - Program, OCAS Description, Units, Unit Cost, Req. Unit Type, Matched Funds, Total, Approv Total, Amt. to Invoice, Current Line Invoiced, Total Invoiced, and Worksheet Budget Line Desc. Below the table, there is a '+ Attachments' section, which is circled in orange. An orange arrow points to the '+ Attachments' section.

NOTE: Refer to page 12 of the BIS Guidelines for invoicing requirements.

IMPORTANT: Invoice line items and attached supporting documents must match. All attachments must be uploaded in one pdf.

2.4 –

1. Click **Browse** to locate the files on your computer.
2. Select **Upload and Save File** to attach the file. A message box will say you have successfully uploaded the file. Close this box.

OKLAHOMA DEPARTMENT OF CAREER TECH EDUCATION

FLA-Local Finance Coordinator

+ Basic Client Information

+ Project Details

+ Grant Allocation

+ Invoice Line Items

- Attachments

Browse: 1 - - 2

Attachment Note:

Add note here for extenuating circumstances related to the line items or attachments.

Active/inactive file(s) Download all files

| File Name | Date | Note | Action | Detail Status |
|-----------|------|------|--------|---------------|
|-----------|------|------|--------|---------------|

+ Acknowledgements

Invoice Summary | One Step Back | Save as Draft | Submit For Approval

2.5 - Go to the **Acknowledgements** tab by clicking on the **+(plus)** sign to expand this section. Check the required acknowledgment box. Type an acknowledgment note in the box. Any extenuating circumstances related to the line item or attachment should be added here with detail. If you don't have a note to add, type your initials, as this field is required. Then, click the **Submit for Approval** button.

Oklahoma Department of Career and Technology Education

EDI- Local BIS Coordinator

Grants

Grant Process

EDI Process

EDI New Worksheet / Agr

EDI Manage Grant Works

EDI Invoice Process

+ Basic Client Information

+ Project Details

+ Grant Allocation

+ Invoice Line Items

+ Attachments

- Acknowledgements

☒ By checking this box, I certify that the information provided is accurate and complete.

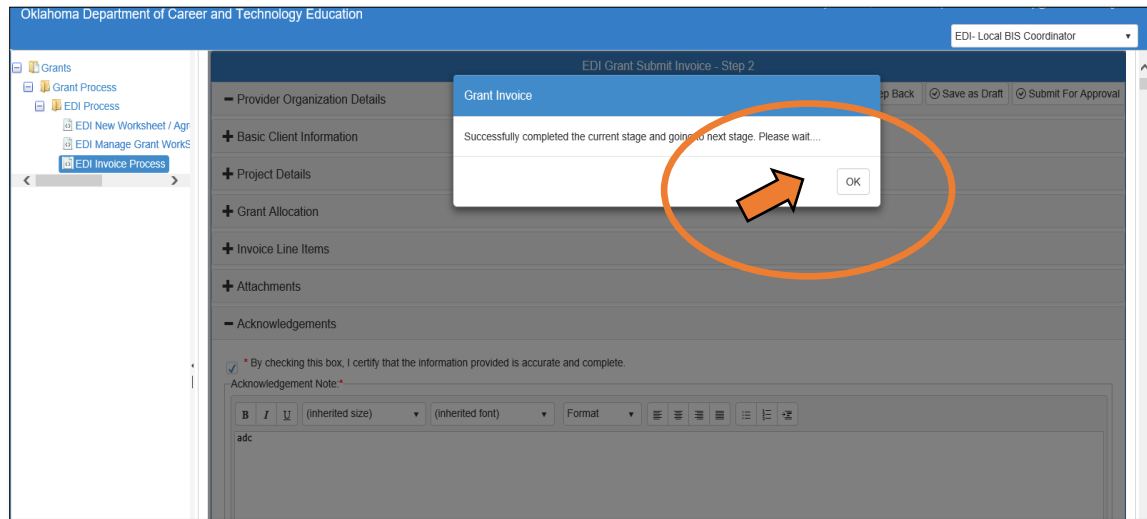
Acknowledgement Note:

Add note here. If you do not have a note to add, type your initials. This field is required.

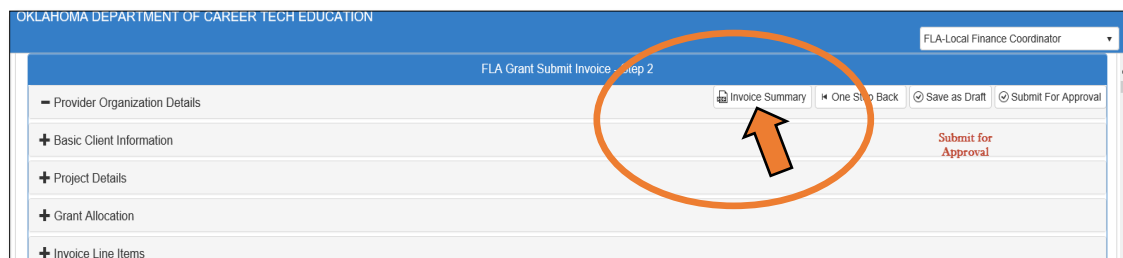
Refresh | View SOU | Invoice Summary | One Step Back | Save as Draft | Submit For Approval


NOTE: If you are not finished with the invoice, you can select **Save as Draft** and return at a later time to make changes, then submit for approval.

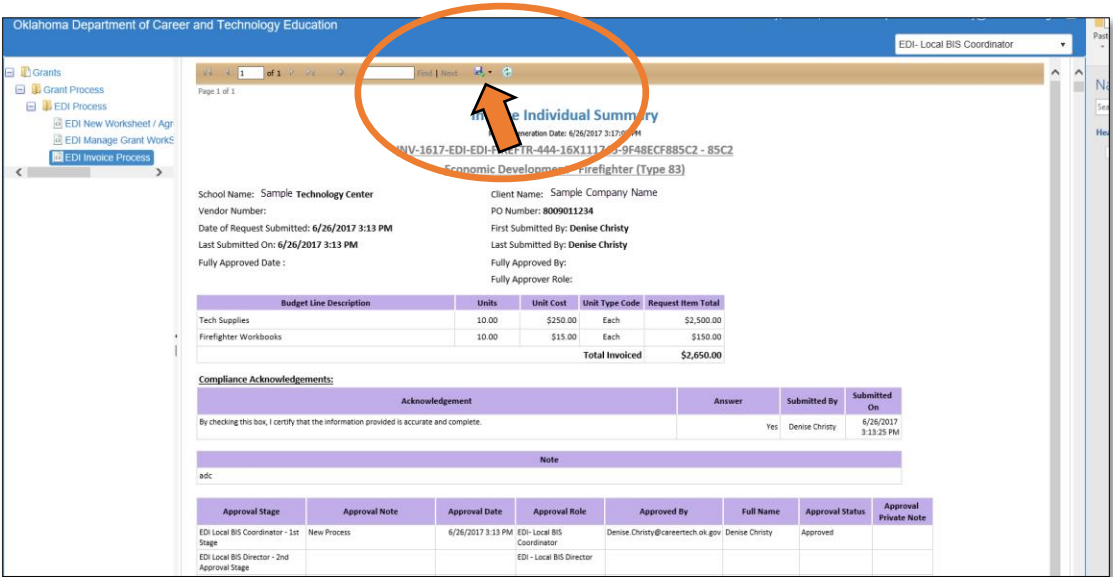
2.5 – A message will pop-up to let you know that you have successfully submitted the invoice to the next approval stage. Click **OK**.



2.6 - Go to the **Invoice Summary** tab to print or save a pdf report of the claim you have submitted.




2.7 - Click on the  symbol to download a pdf of your invoice summary.



Oklahoma Department of Career and Technology Education

EDI - Local BIS Coordinator

1 of 1

Print | Home | 

Invoice Individual Summary

Generation Date: 6/26/2017 3:13 PM

INV-1617-EDI-EDI-TR-444-16X1117-9F48ECF885C2 - 85C2

Economic Development - Firefighter (Type 83)

School Name: Sample Technology Center
Vendor Number:
Date of Request Submitted: 6/26/2017 3:13 PM
Last Submitted On: 6/26/2017 3:13 PM
Fully Approved Date:

Client Name: Sample Company Name
PO Number: 8009011234
First Submitted By: Denise Christy
Last Submitted By: Denise Christy
Fully Approved By:
Fully Approver Role:

| Budget Line Description | Units | Unit Cost | Unit Type Code | Request Item Total |
|-------------------------|-------|-----------|----------------|--------------------|
| Tech Supplies | 10.00 | \$250.00 | Each | \$2,500.00 |
| Firefighter Workbooks | 10.00 | \$15.00 | Each | \$150.00 |
| Total Invoiced | | | | \$2,650.00 |

Compliance Acknowledgements:

| Acknowledgement | Answer | Submitted By | Submitted On |
|---|--------|----------------|-------------------|
| By checking this box, I certify that the information provided is accurate and complete. | Yes | Denise Christy | 6/26/2017 3:13 PM |

Note

adc

| Approval Stage | Approval Note | Approval Date | Approval Role | Approved By | Full Name | Approval Status | Approval Private Note |
|---|---------------|-------------------|-----------------------------|----------------------------------|----------------|-----------------|-----------------------|
| EDI Local BIS Coordinator - 1st Stage | New Process | 6/26/2017 3:13 PM | EDI - Local BIS Coordinator | Denise.Christy@careertech.ok.gov | Denise Christy | Approved | |
| EDI Local BIS Director - 2nd Approval Stage | | | EDI - Local BIS Director | | | | |

The invoice has been successfully submitted and will go to the **EDI Local BIS Director**.

Invoice Change Request

Changes to Invoices after Submitting for Approval

- To make changes to an invoice after it has been submitted for approval, you will need to do a change request in the invoice. Open the invoice to be changed using the steps mentioned above in the [Accessing the Invoice](#) section. At the bottom right of the screen (you may need to use the scroll bar at the bottom) click **Change Request**.

| Budget Line (OCAS CODE) | Function - Object - Program | OCAS Description | Units | Unit Cost | Req. Unit Type | Matched Funds | Total | Approv |
|-------------------------|--|------------------|-------|-----------|----------------|---------------|-------------|-------------|
| 1500-610-590 | 1500-General Supplies-610-General Suppl... | | 20.00 | \$40.00 | Cost Per Hour | \$0.00 | \$800.00 | \$800.00 |
| 1500-610-590 | 1500-General Supplies-610-General Suppl... | | 12.00 | \$40.00 | Cost Per Hour | \$0.00 | \$480.00 | \$480.00 |
| 1500-610-590 | 1500-General Supplies-610-General Suppl... | | 10.00 | \$40.00 | Cost Per Hour | \$0.00 | \$400.00 | \$400.00 |
| 1500-610-590 | 1500-General Supplies-610-General Suppl... | | 5.00 | \$40.00 | Cost Per Hour | \$0.00 | \$200.00 | \$200.00 |
| 1500-610-590 | 1500-General Supplies-610-General Suppl... | | 10.00 | \$40.00 | Cost Per Hour | \$0.00 | \$400.00 | \$400.00 |
| 1500-610-590 | 1500-General Supplies-610-General Suppl... | | 5.00 | \$40.00 | Cost Per Hour | \$0.00 | \$200.00 | \$200.00 |
| 1500-610-590 | 1500-General Supplies-610-General Suppl... | | 10.00 | \$40.00 | Cost Per Hour | \$0.00 | \$400.00 | \$400.00 |
| 1500-610-590 | 1500-General Supplies-610-General Suppl... | | 5.00 | \$40.00 | Cost Per Hour | \$0.00 | \$200.00 | \$200.00 |
| 1500-610-590 | 1500-General Supplies-610-General Suppl... | | 5.00 | \$40.00 | Cost Per Hour | \$0.00 | \$200.00 | \$200.00 |
| 1500-610-590 | 1500-General Supplies-610-General Suppl... | | 24.00 | \$11.53 | Cost Per Each | \$0.00 | \$276.72 | \$276.72 |
| 1500-610-590 | 1500-General Supplies-610-General Suppl... | | 40.00 | \$40.00 | Cost Per Hour | \$0.00 | \$1,600.00 | \$1,600.00 |
| | | | | | | \$0.00 | \$15,236.72 | \$15,236.72 |

Refresh View BIS PEF View SOU Invoice Summary One Step Back Save as Draft Submit for Approval **Change Request**

- Initiating the change request will cancel the approval process. If you are sure you would like to begin the Change Request click **OK** to confirm.

EDI Grant Submit Invoice - Step 2

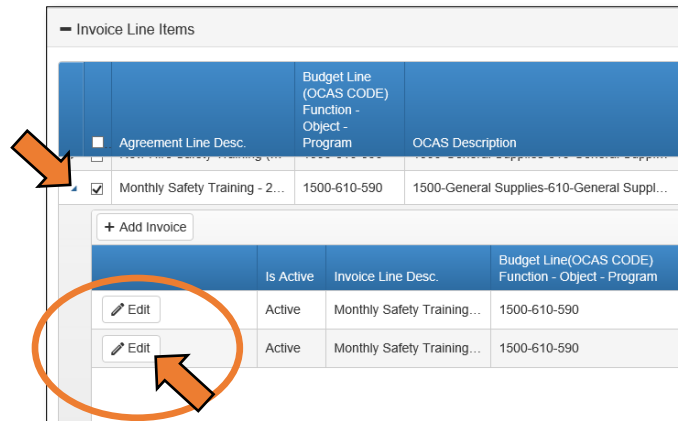
Change Request

You are going to cancel the approval process and initiating the change request process, Are you sure?

Cancel OK

- Click the ► next to the invoice line item you need to change to expand it. Then, click the **Edit** button to make the changes.

NOTE: You can change the **Units, Unit Cost, Req. Unit Type,** and **Matched Funds** to change the Total and Total to be Invoiced columns.



- At this point, you can **Save as Draft** and come back to it later if necessary, or **Submit for Approval** to send it to the next approval stage.

IMPORTANT: Changes to an Invoice can only be made by the EDI Local Coordinator. If an invoice is at the final approval stage - ODCTE Finance Reviewer, a change request is no longer an option. If you need to make a change at this stage, you must contact the ODCTE Finance Reviewer to request they reject the invoice. Then, you can initiate the change request.

Changes for Invoices that Have Not Been Submitted for Approval

- If you need to make changes to an amount on an invoice that has already been created, but not submitted for approval, go to the invoice by clicking on the **Manage Invoices** tab on the **EDI Grant Fund Invoices List** screen and click on the **Invoice Number** in the **Invoice** column.



- Click **Next Step** to get to the **EDI Grant Submit Invoice- Step 2** screen.

EDI Grant Submit Invoice - Step 1

Provider Organization Details

Fiscal Calendar Year: 2018-2019
 Organization Type: Tech Center Districts
 Organization District: Meridian Technology Center
 Worksheet No.: WS-1819-EDI-EDI-TIP-434-16X111745-F815ECF759A3
 Agreement No.: WSAG-1819-EDI-EDI-TIP-434-16X111745-DD198D78C5DA
 Invoice No.: INV-1819-EDI-EDI-TIP-434-16X111745-79CB797AB0D6

Grant Fund Type: EDI
 Organization: Meridian Technology Center
 Program Initiative: Economic Development - Training for Industry Programs (Typ...)

Basic Client Information

Project Details

Refresh Next Step

- In the **Budget Line** section, click the **Edit** button. Make the changes to the **Unit**, **Unit Cost**, and/or **Req. Unit Type** column to change the **Total to be Invoiced** column amount. Click **Update** to complete the edit.

Invoice Line Items

| Agreement Line Desc. | Budget Line (OCAS CODE) Function - Object - Program | OCAS Description | Units | Unit Cost | Req. Unit Type | Matched Funds | Total | Approv Total | Avl. to Invoice | Current Line Invoiced | Total Invoiced | Worksheet Budget Line Desc. |
|--------------------------------|--|---|-------|------------|----------------|---------------|------------|----------------------|-----------------|-----------------------|-----------------|--------------------------------|
| Flashover (10s 2c 0h) 914 &... | 1000-100-590 | 1000-Personnel Services - Salaries-100-Perso... | 1.00 | \$1,000.00 | Cost Per Class | \$0.00 | \$1,000.00 | \$1,000.00 | \$1,000.00 | \$0.00 | \$0.00 | Flashover (10s 2c 0h) 914 &... |
| + Add Invoice | | | | | | | | | | | | |
| Is Active | Invoice Line Desc. | Budget Line(OCAS CODE) Function - Object - Program | Units | Unit Cost | Req. Unit Type | Matched Funds | Total | Total To Be Invoiced | Date Of Expense | Serial Number | Local Reference | |
| Active | Flashover (10s 2c 0h) 914 &... | 1000-100-590 | 1.00 | \$1,000.00 | Cost Per Class | \$0.00 | \$1,000.00 | \$1,000.00 | | | | |
| | | | | | | | \$1,000.00 | \$1,000.00 | | | | |



- When you've made all the necessary changes, you can click **Save as Draft**, or **Submit for Approval**.

Local BIS Director

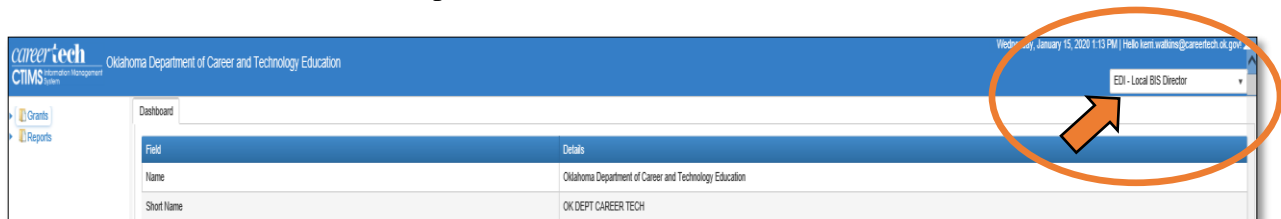
Accessing the Invoice

- Sign in at <https://ctims.okcareertech.org/CTBDSWeb/> using your school email and CTIMS password.

© 2018 - Use the Microsoft Internet Explorer Version 11 or higher. CTIMS is currently not compatible with other browsers.

IMPORTANT: Please log into CTIMS using **Internet Explorer**  **version 11 or higher** or **Microsoft Edge** . CTIMS is currently not compatible with other browsers.

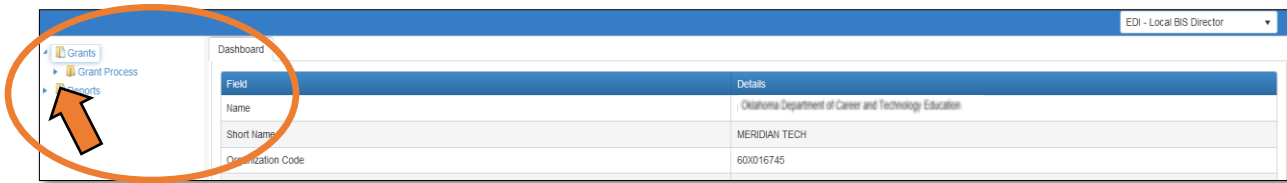
- Verify that you are signed in with the role of an **EDI Local BIS Director** in the top right-hand corner. Use the drop-down arrow to select this role.



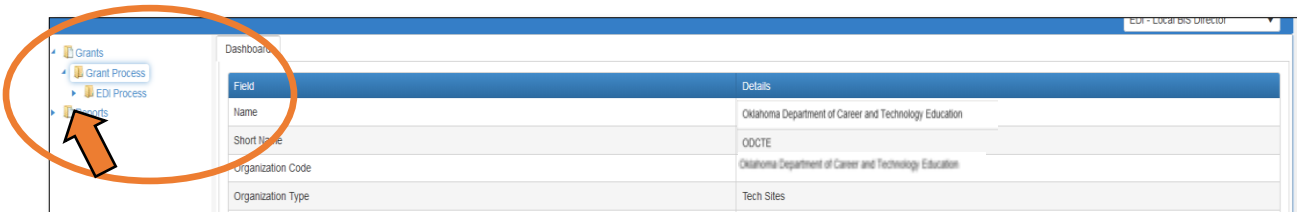
- Click the arrow |▶ next to **Grants** on left navigation.



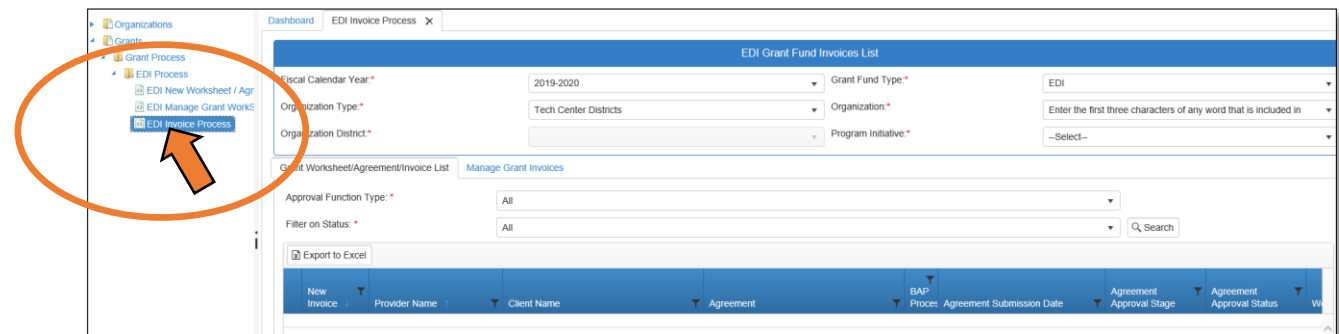
- Click the arrow ► next to **Grant Process** on left navigation.



- Click the arrow ► next to **EDI Process** on left navigation.



- Select the **EDI Invoice Process**.



Opening the Invoice

Complete the **EDI Grant Fund Invoices List** form. The tagged numbers on the screenshot correspond to the instruction steps below.

1. Verify **Fiscal Calendar Year***.
2. Verify **Grant Fund Type** is set to **EDI***.
3. Select your correct **Organization Type** from the drop-down menu. This should default to Tech Center Districts.
4. Select your **Organization** by typing in the first three characters of the name.
5. Verify the **Organization District***.
6. Select a **Program Initiative***.
7. **Approval Function Type** will remain as **All**.
8. **Filter on Status** will remain as **All**.
9. Select the **Search** button to search for any outstanding invoices that need your approval.

NOTE: A red asterisk (*) indicates a required field.

The screenshot shows the 'EDI Grant Fund Invoices List' form. It includes several dropdown menus and a search button. Red numbers 1 through 9 are placed next to specific fields to indicate where to click or enter information according to the instructions.

- 1 - Fiscal Calendar Year*
- 2 - Grant Fund Type*
- 3 - Organization Type*
- 4 - Organization*
- 5 - Organization District*
- 6 - Program Initiative*
- 7 - Approval Function Type*
- 8 - Filter on Status*
- 9 - Search button

- Click on the **Manage Grant Invoices** tab.

This is a close-up of the 'Manage Grant Invoices' tab. It shows the 'Approval Function Type' and 'Filter on Status' dropdowns, both set to 'All'. There is an 'Export to Excel' button and a search button. The table below has columns for New Invoice, Provider Name, Client Name, Agreement, BAP Process, Agreement Submission Date, Agreement Approval Stage, Agreement Approval Status, Worksheet, Worksheet Submission Date, Worksheet Stage, Worksheet Status, and Sub Award Allocation.

- Click on the **invoice number** in the invoice column to choose the invoice to review and approve.

Dashboard | EDI Invoice Process | X

EDI Grant Fund Invoices List

Fiscal Calendar Year: 2018-2019 | Grant Fund Type: EDI

Organization Type: Tech Center Districts | Organization: Sample Technology Center

Organization District: Sample Technology Center | Program Initiative: Economic Development - Training for Industry Programs (Type...

Grant Worksheet/Agreement/Invoice List | Manage Grant Invoices

☒ Save changes | ☐ Cancel changes | ☐ Export to Excel | ☐ Refresh

| | Status | BAP Proces | Payme Days | Organization | Client Name | Program Initiative | Invoice | Invoice No. | Invoice Submitted On | Last App |
|--------------------------|--------|---------------|---------------|--------------------------|----------------------------------|--------------------------|--------------------------------------|----------------|----------------------|----------|
| <input type="checkbox"/> | Yes | Yes | 0 | Sample Technology Center | Sample Company Test Incorporated | Economic Development ... | INV-1819-EDI-EDI-TIP-434-16X11745... | 1398 | 04/29/2019 15:11:31 | EDI Loca |
| <input type="checkbox"/> | Yes | Yes | 0 | Sample Technology Center | Sample Company Test Incorporated | Economic Development ... | INV-1819-EDI-EDI-TIP-434-16X11745... | 16 | 04/29/2019 00:00:00 | |
| <input type="checkbox"/> | Yes | Yes | 0 | Sample Technology Center | Sample Company Test Incorporated | Economic Development ... | INV-1819-EDI-EDI-TIP-434-16X11745... | 55 | 04/29/2019 00:00:00 | |

NOTE: To view an invoice approval summary, click on the ► next to the invoice line you want to view. This summary will allow you to see the approval status and approval notes. You can also filter by the Current Approval Stage column (use the scroll bar to scroll to the right). Click on the filter icon and type in your role. This will allow you to see only the invoices you have at your approval stage.

EDI Grant Submit Invoice Step-1

1.1 - Review the information on the **EDI Grant Submit Invoice Step-1** screen and click **Next Step**.

Dashboard | EDI Invoice Process | X | INV-1819-EDI-EDI-TIP-434-16X11745-79CB797AB0D6 | X

EDI Grant Submit Invoice - Step 1

Provider Organization Details

Fiscal Calendar Year: 2018-2019 | Grant Fund Type: EDI

Organization Type: Tech Center Districts | Organization: Sample Technology Center

Organization District: Sample Technology Center | Program Initiative: Economic Development - Training for Industry Programs (Typ...

Worksheet No: WS-1819-EDI-EDI-TIP-434-16X11745-F815ECF759A3

Agreement No: WSAG-1819-EDI-EDI-TIP-434-16X11745-DD198D78C5DA

Invoice No: INV-1819-EDI-EDI-TIP-434-16X11745-79CB797AB0D6

Basic Client Information

Project Details

EDI Grant Submit Invoice Step-2

2.1 - Review and verify the information on the **EDI Grant Submit Invoice Step-2** screen. You can expand the sections by clicking on the +(plus) sign. Then view the invoice details by clicking on the ► next to the agreement line.

| Invoice Line Items | | | | | | | | | | |
|--------------------------------|---|--|-------|-----------|----------------|---------------|------------|----------------------|-----------------|--|
| Agreement Line Desc. | Budget Line (OCAS CODE) Function - Object - Program | OCAS Description | Units | Unit Cost | Req. Unit Type | Matched Funds | Total | Approv Total | | |
| Medic-First Aid (15S, 10H,...) | 1500-600-590 | 1500-Supplies-600-Supplies-590-Client-Ba... | 2.00 | \$617.00 | Cost Per Class | \$0.00 | \$1,234.00 | \$1,234.00 | | |
| Is Active | Invoice Line Desc. | Budget Line(OCAS CODE) Function - Object - Program | Units | Unit Cost | Req. Unit Type | Matched Funds | Total | Total To Be Invoiced | Date Of Expense | |
| Active | Medic-First Aid (15S, 10H,...) | 1500-600-590 | 1.00 | \$355.50 | Cost Per Class | \$0.00 | \$355.50 | \$355.50 | | |

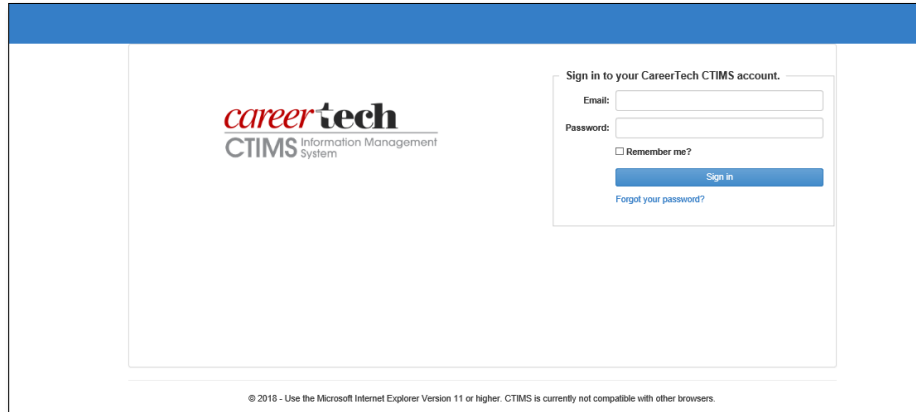
IMPORTANT: You must review the invoiced line items and attachments. Invoice line items and attached supporting documents must match.

2.2 – Click **Submit for Approval** at the top or bottom of the screen. The invoice will now go to the next approval stage.

Local Finance Coordinator

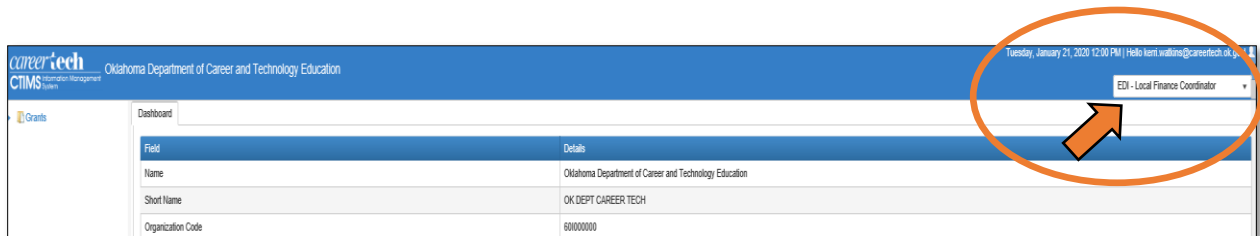
Accessing the Invoice

- Sign in at <https://ctims.okcareertech.org/CTBDSWeb/> using your school email and CTIMS password.




IMPORTANT: Please log into CTIMS using Internet Explorer  version 11 or higher or Microsoft Edge . CTIMS is currently not compatible with other browsers.

- Verify that you are signed in with the role of an **EDI Local Finance Coordinator** in the top right-hand corner. Use the drop-down arrow to select this role.

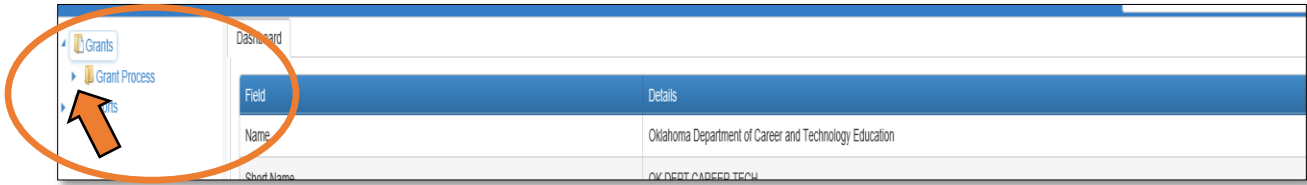


| Field | Details |
|-------------------|--|
| Name | Oklahoma Department of Career and Technology Education |
| Short Name | OK DEPT CAREER TECH |
| Organization Code | 60000000 |

- Click the arrow  next to **Grants** on left navigation.



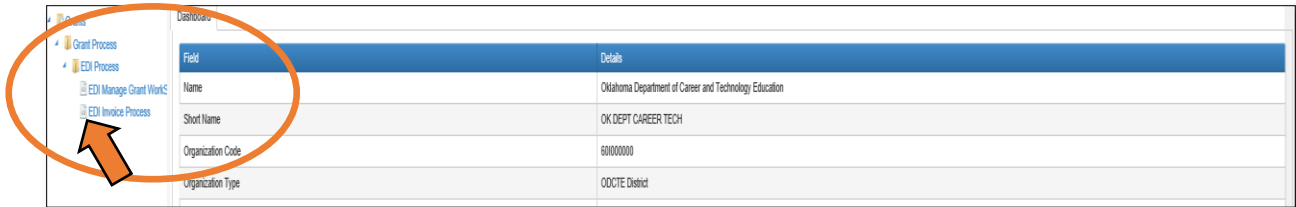
- Click the arrow | ► next to **Grant Process** on left navigation.



- Click the arrow | ► next to **EDI Process** on left navigation.



- Select the **EDI Invoice Process**.



Opening the Invoice

Complete the **EDI Grant Fund Invoices List** form. The tagged numbers on the screenshot correspond to the instruction steps below.

1. Verify **Fiscal Calendar Year***.
2. Verify **Grant Fund Type** is set to **EDI***.
3. Select your correct **Organization Type** from the drop-down menu. This should default to Tech Center Districts.
4. Select your **Organization** by typing in the first three characters of the name.
5. Verify the **Organization District***.
6. Select a **Program Initiative***.
7. **Approval Function Type** will remain as **All**.
8. **Filter on Status** will remain as **All**.
9. Select the **Search** button to search for any outstanding invoices that need your approval.

NOTE: A red asterisk (*) indicates a required field.

The screenshot shows the 'EDI Grant Fund Invoices List' form. It includes several dropdown menus and a search button. Red numbers 1 through 9 are placed next to specific fields to indicate where to click or enter information according to the instructions. The fields are: 1 - Fiscal Calendar Year*, 2 - Grant Fund Type*, 3 - Organization Type*, 4 - Organization*, 5 - Organization District*, 6 - Program Initiative*, 7 - Approval Function Type*, 8 - Filter on Status*, and 9 - Search button.

- Click on the **Manage Grant Invoices** tab.

This is a close-up of the 'Manage Grant Invoices' tab. An orange circle highlights the 'Manage Grant Invoices' link, and a red arrow points to it. The form below the tab shows the 'Approval Function Type' and 'Filter on Status' dropdowns, both set to 'All', and a 'Search' button.

- Click on the invoice number in the **Invoice column** to choose the invoice to review and approve.

Dashboard | EDI Invoice Process | X

EDI Grant Fund Invoices List

Fiscal Calendar Year: 2018-2019 | Grant Fund Type: EDI

Organization Type: Tech Center Districts | Organization: Sample Technology Center

Organization District: Sample Technology Center | Program Initiative: Economic Development - Training for Industry Programs (Type...

Grant Worksheet/Agreement/Invoice List | Manage Grant Invoices

☒ Save changes | ☐ Cancel changes | ☐ Export to Excel | ☐ Refresh

| | Status | BAP Proces | Payme Days | Organization | Client Name | Program Initiative | Invoice | Invoice No. | Invoice Submitted On | Last App |
|--------------------------|--------|---------------|---------------|--------------------------|----------------------------------|--------------------------|--------------------------------------|----------------|----------------------|----------|
| <input type="checkbox"/> | Yes | Yes | 0 | Sample Technology Center | Sample Company Test Incorporated | Economic Development ... | INV-1819-EDI-EDI-TIP-434-16X11745... | 1398 | 04/29/2019 15:11:31 | EDI Loca |
| <input type="checkbox"/> | Yes | Yes | 0 | Sample Technology Center | Sample Company Test Incorporated | Economic Development ... | INV-1819-EDI-EDI-TIP-434-16X111... | 16 | 04/29/2019 00:00:00 | |
| <input type="checkbox"/> | Yes | Yes | 0 | Sample Technology Center | Sample Company Test Incorporated | Economic Development ... | INV-1819-EDI-EDI-TIP-434-16X11... | 55 | 04/29/2019 00:00:00 | |

NOTE: To view an invoice approval summary, click on the ► next to the invoice line you want to view. This summary will allow you to see the approval status and approval notes. You can also filter by the Current Approval Stage column (use the scroll bar to scroll to the right). Click on the filter icon and type in your role. This will allow you to see only the invoices you have at your approval stage.

EDI Grant Submit Invoice Step-1

1.1 - Review the information on the **EDI Grant Submit Invoice Step-1** screen and click **Next Step**.

Dashboard | EDI Invoice Process | X | INV-1819-EDI-EDI-TIP-434-16X111745-79CB797AB0D6 | X

EDI Grant Submit Invoice - Step 1

Provider Organization Details

Fiscal Calendar Year: 2018-2019 | Grant Fund Type: EDI

Organization Type: Tech Center Districts | Organization: Sample Technology Center

Organization District: Sample Technology Center | Program Initiative: Economic Development - Training for Industry Programs (Typ...

Worksheet No: WS-1819-EDI-EDI-TIP-434-16X111745-F819ECF759A3

Agreement No: WSAG-1819-EDI-EDI-TIP-434-16X111745-DD198D78C5DA

Invoice No: INV-1819-EDI-EDI-TIP-434-16X111745-79CB797AB0D6

Basic Client Information

Project Details

EDI Grant Submit Invoice Step-2

2.1 - Review the information on the **EDI Grant Submit Invoice Step-2** screen. You can expand the sections by clicking on the +(plus) sign. Then view the invoice details by clicking on the ► next to the agreement line.

| Invoice Line Items | | | | | | | | | | |
|-------------------------------|---|---|-----------|----------------|----------------|---------------|----------------------|-----------------|--|--|
| Agreement Line Desc. | Budget Line (OCAS CODE) Function - Object - Program | OCAS Description | Units | Unit Cost | Req. Unit Type | Matched Funds | Total | Approv Total | | |
| Medic-First Aid (15S, 10H,... | 1500-600-590 | 1500-Supplies-600-Supplies-590-Client-Ba... | 2.00 | \$617.00 | Cost Per Class | \$0.00 | \$1,234.00 | \$1,234.00 | | |
| Invoice Line Desc. | Budget Line(OCAS CODE) Function - Object - Program | Units | Unit Cost | Req. Unit Type | Matched Funds | Total | Total To Be Invoiced | Date Of Expense | | |
| Medic-First Aid (15S, 10H,... | 1500-600-590 | 1.00 | \$355.50 | Cost Per Class | \$0.00 | \$355.50 | \$355.50 | | | |

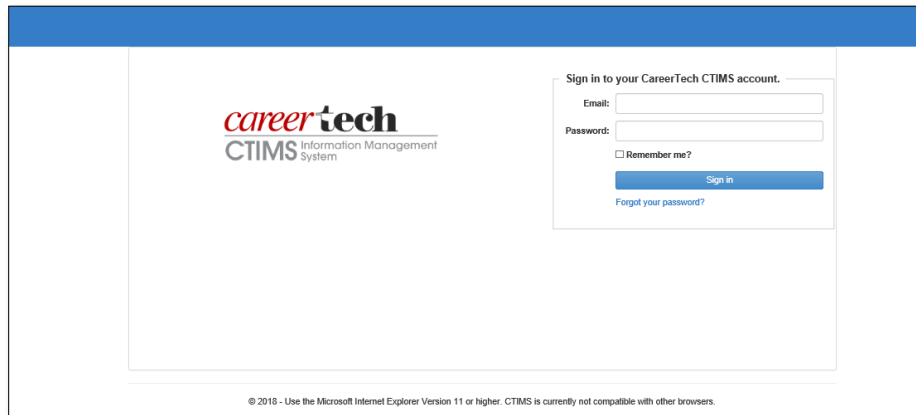
IMPORTANT: You must review the invoiced line items and attachments. Invoice line items and attached supporting documents must match.

2.2 – Click **Submit for Approval** at the top or bottom of the screen. The invoice will now go to the next approval stage.

State Regional Coordinator

Accessing the Invoice

- Sign in at <https://ctims.okcareertech.org/CTBDSWeb/> using your school email and CTIMS password.



IMPORTANT: Please log into CTIMS using Internet Explorer  version 11 or higher or Microsoft Edge . CTIMS is currently not compatible with other browsers.

- Verify that you are signed in with the role of **EDI State Regional Coordinator** in the top right-hand corner. Use the drop-down arrow to select this role.



| Field | Details |
|-------------------|--|
| Name | Oklahoma Department of Career and Technology Education |
| Short Name | OK DEPT CAREER TECH |
| Organization Code | 60000000 |

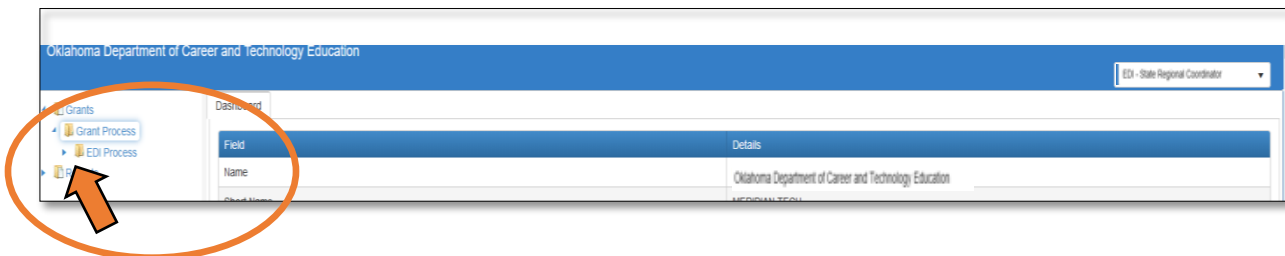
- Click the arrow ► next to **Grants** on left navigation.



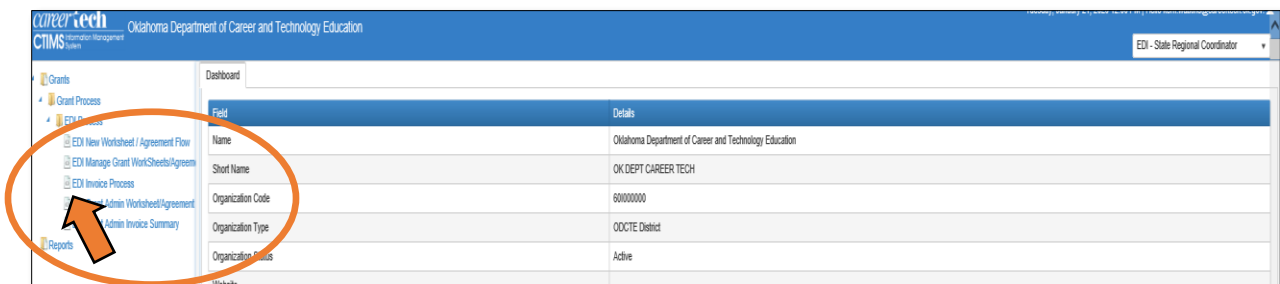
- Click the arrow ► next to **Grant Process** on left navigation.



- Click the arrow ► next to **EDI Process** on left navigation.



- Click the arrow ► next to **EDI Invoice Process** on left navigation



Opening the Invoice

Complete the **EDI Grant Fund Invoices List** form. The tagged numbers on the screenshot correspond to the instruction steps below.

1. Verify **Fiscal Calendar Year***.
2. Verify **Grant Fund Type** is set to **EDI***.
3. Select your correct **Organization Type** from the drop-down menu. This should default to Tech Center Districts.
4. Select your **Organization** by typing in the first three characters of the name.
5. Verify the **Organization District***.
6. Select a **Program Initiative***.
7. **Approval Function Type** will remain as **All**.
8. **Filter on Status** will remain as **All**.
9. Select the **Search** button to search for any outstanding invoices that need your approval.

NOTE: A red asterisk (*) indicates a required field.

The screenshot shows the 'EDI Grant Fund Invoices List' form. It includes several dropdown menus and a search button. Red numbers 1 through 9 are placed next to specific fields to indicate where to click or enter information according to the instructions. Field 1 is 'Fiscal Calendar Year*', field 2 is 'Grant Fund Type*', field 3 is 'Organization Type*', field 4 is 'Organization*', field 5 is 'Organization District*', field 6 is 'Program Initiative*', field 7 is 'Approval Function Type*', field 8 is 'Filter on Status:', and field 9 is the 'Search' button.

- Click on the **Manage Grant Invoices** tab.

This is a close-up of the 'Manage Grant Invoices' tab. An orange circle highlights the 'Manage Grant Invoices' link, and a red arrow points to it. The form below the tab shows 'Approval Function Type:' set to 'All' and 'Filter on Status:' set to 'All'. The 'Search' button is also visible.

- Click on the **invoice number** in the invoice column to choose the invoice to review and approve.

Dashboard | EDI Invoice Process | X

EDI Grant Fund Invoices List

Fiscal Calendar Year: 2018-2019 Grant Fund Type: EDI
 Organization Type: Tech Center Districts Organization: Sample Technology Center
 Organization District: Sample Technology Center Program Initiative: Economic Development - Training for Industry Programs (Type...

Grant Worksheet/Agreement/Invoice List | Manage Grant Invoices

☒ Save changes ☐ Cancel changes ☐ Export to Excel ☐ Refresh

| | Status | BAP Proces | Payme Days | Organization | Client Name | Program Initiative | Invoice | Invoice No. | Invoice Submitted On | Last App |
|--------------------------|--------|---------------|---------------|--------------------------|----------------------------------|--------------------------|--------------------------------------|----------------|----------------------|----------|
| <input type="checkbox"/> | Yes | Yes | 0 | Sample Technology Center | Sample Company Test Incorporated | Economic Development ... | INV-1819-EDI-EDI-TIP-434-16X11745... | 1398 | 04/29/2019 15:11:31 | EDI Loca |
| <input type="checkbox"/> | Yes | Yes | 0 | Sample Technology Center | Sample Company Test Incorporated | Economic Development ... | INV-1819-EDI-EDI-TIP-434-16X11745... | 16 | 04/29/2019 00:00:00 | |
| <input type="checkbox"/> | Yes | Yes | 0 | Sample Technology Center | Sample Company Test Incorporated | Economic Development ... | INV-1819-EDI-EDI-TIP-434-16X11745... | 55 | 04/29/2019 00:00:00 | |

NOTE: To view an invoice approval summary, click on the ► next to the invoice line you want to view. This summary will allow you to see the approval status and approval notes. You can also filter by the Current Approval Stage column (use the scroll bar to scroll to the right). Click on the filter icon and type in your role. This will allow you to see only the invoices you have at your approval stage.

EDI Grant Submit Invoice Step-1

1.1 - Review the information on the **EDI Grant Submit Invoice Step-1** screen and click **Next Step**.

Dashboard | EDI Invoice Process | X | INV-1819-EDI-EDI-TIP-434-16X11745-79CB797AB0D6 | X

EDI Grant Submit Invoice - Step 1

Provider Organization Details

Fiscal Calendar Year: 2018-2019 Grant Fund Type: EDI
 Organization Type: Tech Center Districts Organization: Sample Technology Center
 Organization District: Sample Technology Center Program Initiative: Economic Development - Training for Industry Programs (Typ...
 Worksheet No: WS-1819-EDI-EDI-TIP-434-16X11745-F815ECF759A3
 Agreement No: WSAG-1819-EDI-EDI-TIP-434-16X11745-DD198D78C5DA
 Invoice No: INV-1819-EDI-EDI-TIP-434-16X11745-79CB797AB0D6

Basic Client Information
 Project Details

EDI Grant Submit Invoice Step-2

2.1 - Review the information on the **EDI Grant Submit Invoice Step-2** screen. You can expand the sections by clicking on the +(plus) sign. Then view the invoice details by clicking on the ► next to the agreement line.



| Invoice Line Items | | | | | | | | | | |
|--------------------|-------------------------------|---|---|-----------|----------------|----------------|---------------|----------------------|-----------------|--|
| | Agreement Line Desc. | Budget Line (OCAS CODE) Function - Object - Program | OCAS Description | Units | Unit Cost | Req. Unit Type | Matched Funds | Total | Approv Total | |
| 4 | Medic-First Aid (15S, 10H,... | 1500-600-590 | 1500-Supplies-600-Supplies-590-Client-Ba... | 2.00 | \$617.00 | Cost Per Class | \$0.00 | \$1,234.00 | \$1,234.00 | |
| | Invoice Line Desc. | Budget Line(OCAS CODE) Function - Object - Program | Units | Unit Cost | Req. Unit Type | Matched Funds | Total | Total To Be Invoiced | Date Of Expense | |
| | Medic-First Aid (15S, 10H,... | 1500-600-590 | 1.00 | \$355.50 | Cost Per Class | \$0.00 | \$355.50 | \$355.50 | | |

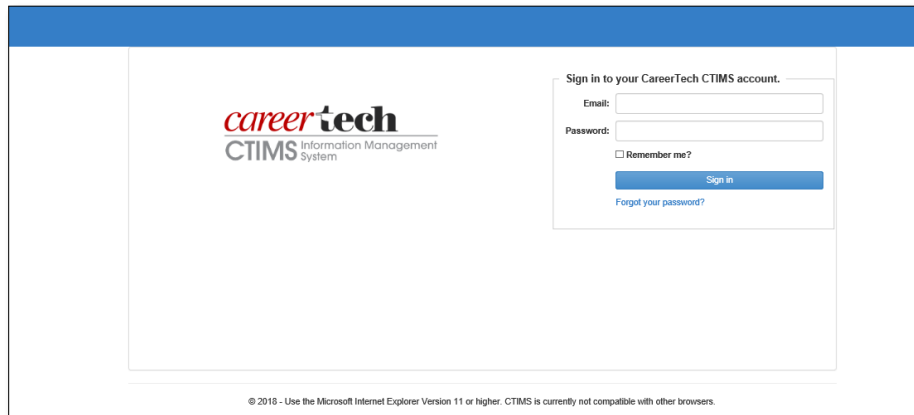
IMPORTANT: You must review the invoiced line items and attachments. Invoice line items and attached supporting documents must match.


2.2 – Click **Submit for Approval** at the top or bottom of the screen. The invoice will now go to the next approval stage.

State Requisition Coordinator

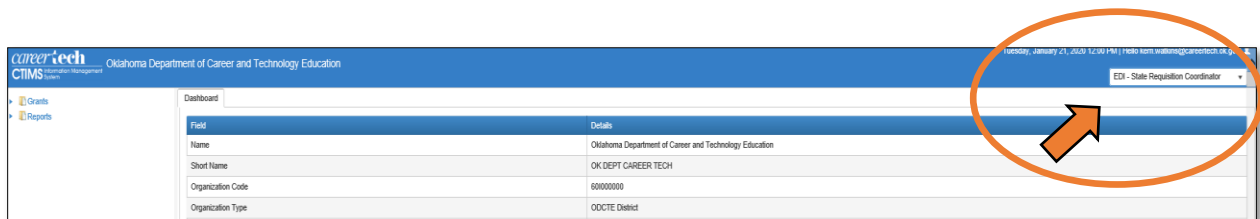
Accessing the Invoice

- Sign in at <https://ctims.okcareertech.org/CTBDSWeb/> using your school email and CTIMS password.

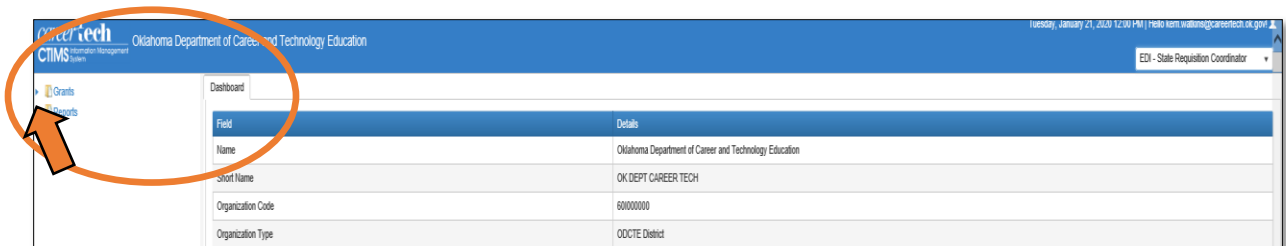


IMPORTANT: Please log into CTIMS using Internet Explorer  version 11 or higher or Microsoft Edge . CTIMS is currently not compatible with other browsers.

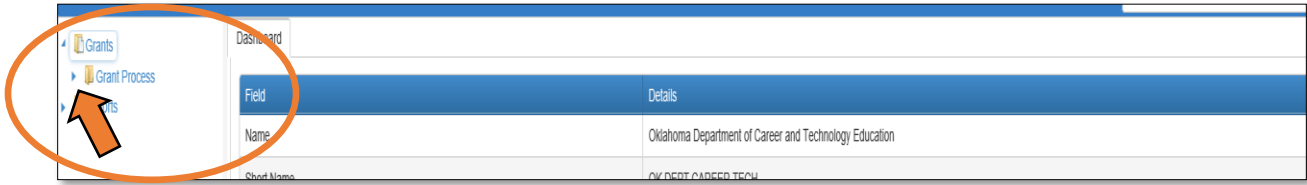
- Verify that you are signed in with the role of an **EDI State Requisition Coordinator** in the top right-hand corner. Use the drop-down arrow to select this role.



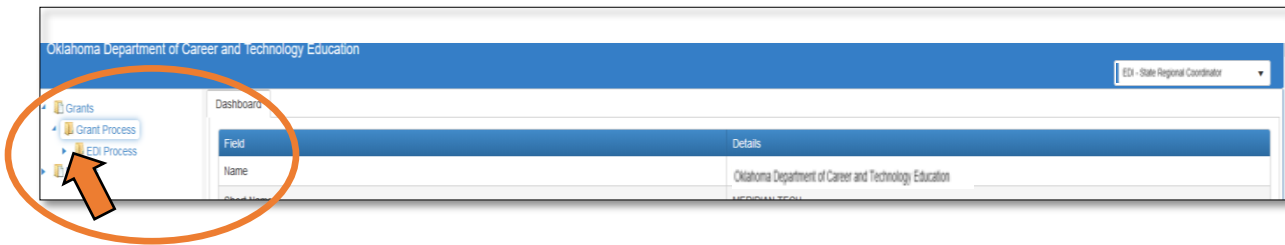
- Click the arrow |▶ next to **Grants** on left navigation.



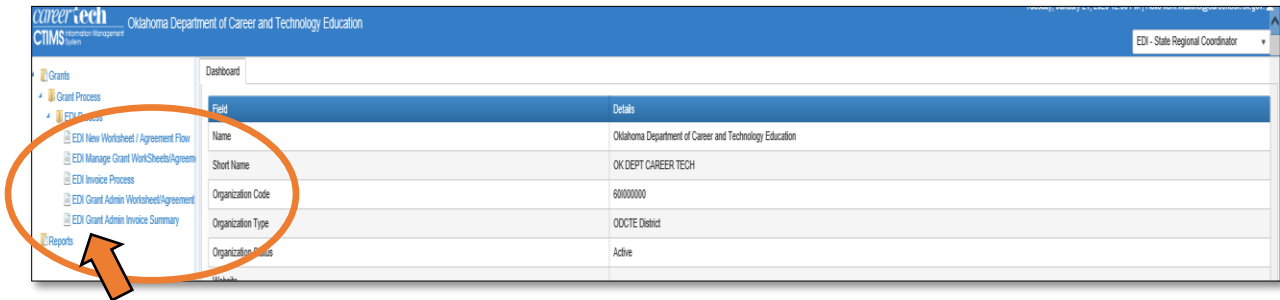
- Click the arrow ► next to **Grant Process** on left navigation.



- Click the arrow ► next to **EDI Process** on left navigation.



- Click the arrow ► next to **EDI Grant Admin Invoice Summary** on left navigation.



Opening the Invoice

Complete the **EDI Grant Fund Invoices List** form. The tagged numbers on the screenshot correspond to the instruction steps below.

1. Verify **Fiscal Calendar Year**.
2. Verify **Grant Fund Type** is set to **EDI**.
3. Select the **Program Initiative** from the drop-down menu, or click the box for **All**.
4. Select your **Organization Type** selecting from the drop-down menu, or click the box for **All**.
5. Choose the **Organization** or click the box for **All**.
6. **Approval Function Type** will remain as **All**.
7. **Filter on Status** will remain as **All**.
8. Select the **Search** button to search for invoices that need your approval.

The screenshot shows the 'EDI Admin Grant Fund Invoices List' form. The form is divided into two main sections: 'Grant Worksheet/Agreement/Invoice List' and 'Manage Grant Invoices'.

Grant Worksheet/Agreement/Invoice List:

- Fiscal Calendar Year:** 1 - 2019-2020
- Grant Fund Type:** 2 - EDI
- Program Initiative:** 3 - All
- Organization Type:** 4 - Tech Center Districts
- Organization:** 5 - Search Organizations...

Manage Grant Invoices:

- Approval Function Type:** 6 - All
- Filter on Status:** 7 - All
- Search:** 8 - Search button

Below the form is a table with columns for New Invoice, Provider Name, Client Name, Agreement, BAP Process Date, Agreement Stage, Worksheet Submission Date, Worksheet Stage, Sub Award Allocation, Worksheet Budgeted, Worksheet Req Budgeted, Agreement Budgeted, Fully Approved Invoiced, and Agreement Unbudgeted.

- Click on the **Manage Grant Invoices** tab.

Grant Worksheet/Agreement/Invoice List **Manage Grant Invoices**

Approval Function Type: All

Filter on Status: All

Export to Excel

| New Invoice | Provider Name | Client Name | Agreement | BAP Process | Agreement Submission Date | Agreement Approval Stage | Agreement Approval Status |
|-------------|---------------|-------------|-----------|-------------|---------------------------|--------------------------|---------------------------|
|-------------|---------------|-------------|-----------|-------------|---------------------------|--------------------------|---------------------------|

- Click on the **invoice number** in the invoice column to choose the invoice to review and approve.

Dashboard

EDI Invoice Process

X

EDI Grant Fund Invoices List

Fiscal Calendar Year:*

2018-2019

Grant Fund Type:*

EDI

Organization Type:*

Tech Center Districts

Organization:*

Sample Technology Center

Organization District:*

Sample Technology Center

Program Initiative:*

Economic Development - Training for Industry Programs (Type...

Grant Worksheet/Agreement/Invoice List

Manage Grant Invoices

Save changes

Cancel changes

Export to Excel

Refresh

| | Status | BAP Process | Payme Days | Organization | Client Name | Program Initiative | Invoice | Invoice Last 4 Digit Reque No. | Invoice Submitted On | Last App |
|---|--------------------------|----------------|---------------|--------------|--------------------------|--------------------------------------|---|---|----------------------|----------|
| ▶ | <input type="checkbox"/> | Yes | Yes | 0 | Sample Technology Center | Sample Company Test Incorporated ... | Economic Development ... INV-1819-EDI-EDI-TIP-434-16X111745-25... | 1398 | 04/29/2019 15:11:31 | EDI Loca |
| ▶ | <input type="checkbox"/> | Yes | Yes | 0 | Sample Technology Center | Sample Company Test Incorporated ... | Economic Development ... INV-1819-EDI-EDI-TIP-434-16X111745-C... | 16... | 04/29/2019 00:00:00 | |
| ▶ | <input type="checkbox"/> | Yes | Yes | 0 | Sample Technology Center | Sample Company Test Incorporated ... | Economic Developmen ... INV-1819-EDI-EDI-TIP-434-16X111... | 55... | 04/29/2019 00:00:00 | |

NOTE: To view an invoice approval summary, click on the ▶ next to the invoice line you want to view. This summary will allow you to see the approval status and approval notes. You can also filter by the Current Approval Stage column (use the scroll bar to scroll to the right). Click on the filter icon and type in your role. This will allow you to see only the invoices you have at your approval stage.

EDI Grant Submit Invoice Step-1

1.1 - Review the information on the **EDI Grant Submit Invoice Step-1** screen and click **Next Step**.

EDI Grant Submit Invoice - Step 1

Provider Organization Details

Fiscal Calendar Year: 2018-2019
 Organization Type: Tech Center Districts
 Organization District: Sample Technology Center
 Worksheet No.: WS-1819-EDI-EDI-TIP-434-16X111745-F815ECF759A3
 Agreement No.: WSAG-1819-EDI-EDI-TIP-434-16X111745-DD198D78C5DA
 Invoice No.: INV-1819-EDI-EDI-TIP-434-16X111745-79CB797AB0D6

Basic Client Information

Project Details

Refresh Next Step

EDI Grant Submit Invoice Step-2

2.1 - Review the information on the **EDI Grant Submit Invoice Step-2** screen. You can expand the sections by clicking on the +(plus) sign. Then view the invoice details by clicking on the ► next to the agreement line.

| Agreement Line Desc. | Budget Line (OCAS CODE) Function - Object - Program | OCAS Description | Units | Unit Cost | Req. Unit Type | Matched Funds | Total | Approv Total |
|-------------------------------|--|---|-------|-----------|----------------|---------------|------------|--------------|
| Medic-First Aid (15S, 10H...) | 1500-600-590 | 1500-Supplies-600-Supplies-590-Client-Ba... | 2.00 | \$617.00 | Cost Per Class | \$0.00 | \$1,234.00 | \$1,234.00 |
| Medic-First Aid (15S, 10H...) | 1500-600-590 | 1500-Supplies-600-Supplies-590-Client-Ba... | 1.00 | \$355.50 | Cost Per Class | \$0.00 | \$355.50 | \$355.50 |

2.2 – Verify the invoice information and print the documentation to deliver to the finance department.

- Click on the **Invoice Summary** button at the top or bottom of the screen.

EDI Grant Submit Invoice - Step 2

Provider Organization Details

Basic Client Information

Project Details

Grant Allocation

Invoice Line Items

Adult Markin with Mon M Sk

2670-650-590

2670-Durable Supplies-650-Durable Suppl...

2.00

\$129.66

Cost Per Each

\$0.00


\$259.32

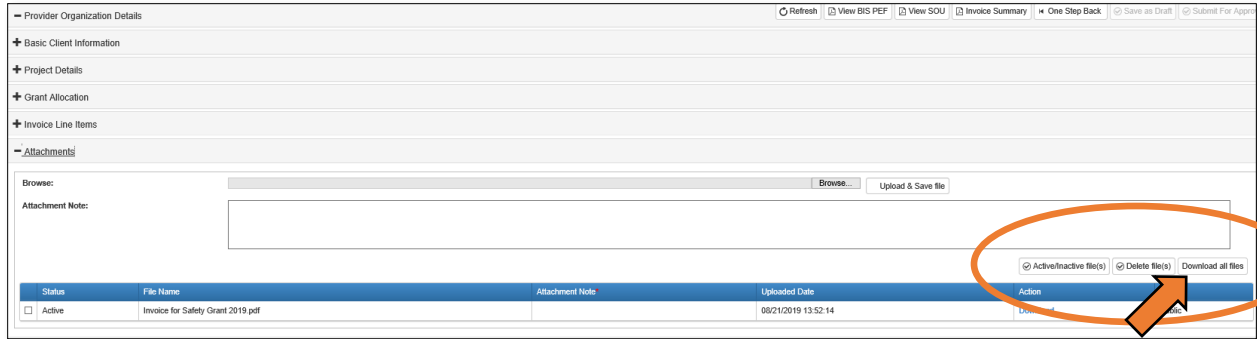
\$259.32

\$0.00

\$259.32

\$259.32

- To print, click on the save icon  above the summary. Export to a pdf to print.
- Download the attachments by expanding the **Attachments** section, then clicking the **Download all files** button.



Provider Organization Details

Basic Client Information

Project Details

Grant Allocation

Invoice Line Items

Attachments

Browse: Browse... Upload & Save file

Attachment Note:

| Status | File Name | Attachment Note | Uploaded Date | Action |
|---------------------------------|-----------------------------------|-----------------|---------------------|----------|
| <input type="checkbox"/> Active | Invoice for Safety Grant 2019.pdf | | 08/21/2019 13:52:14 | Download |

☐ Active/Inactive file(s)
 ☐ Delete file(s)

IMPORTANT: You must review the invoiced line items and attachments. Invoice line items and attached supporting documents must match.

2.3 – Click **Submit for Approval** at the top or bottom of the screen. Deliver the documentation to Finance. The invoice will now go to the ODCTE Finance Reviewer .

Printing a PEF

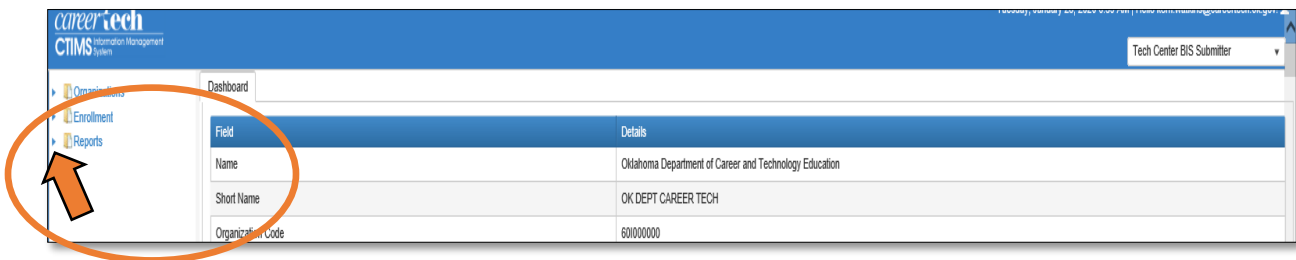
*career***tech**

Printing a PEF

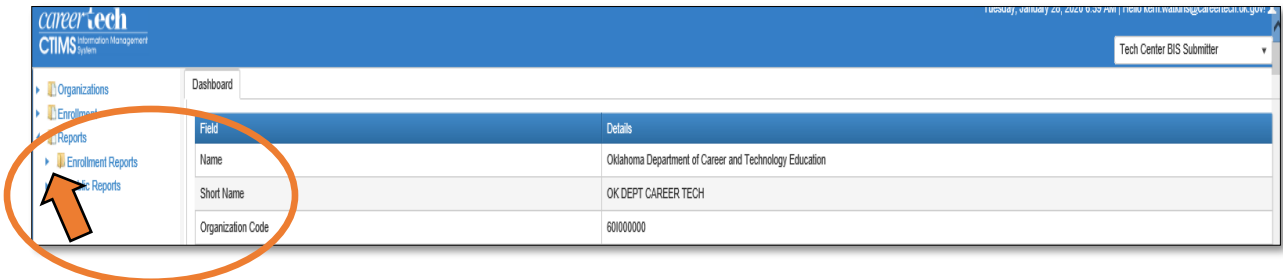
- Verify that you are signed in with the role of **Tech Center BIS Submitter**. In the top right corner. Use the drop-down arrow to select this role.



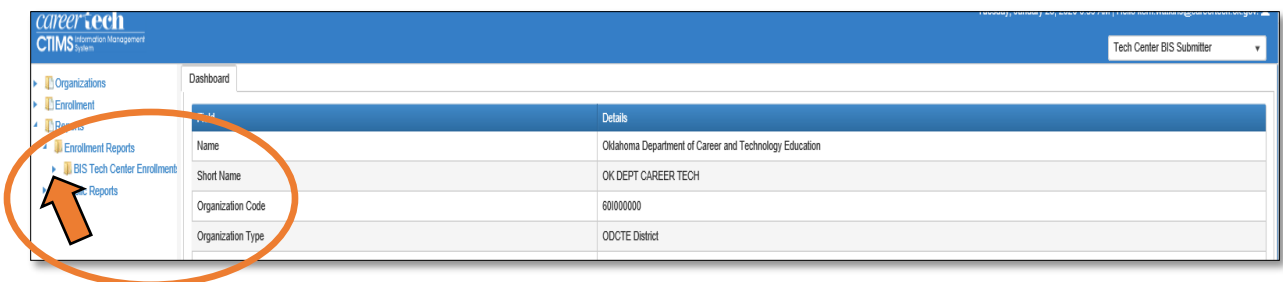
- Click the arrow ► next to **Reports** on left navigation.



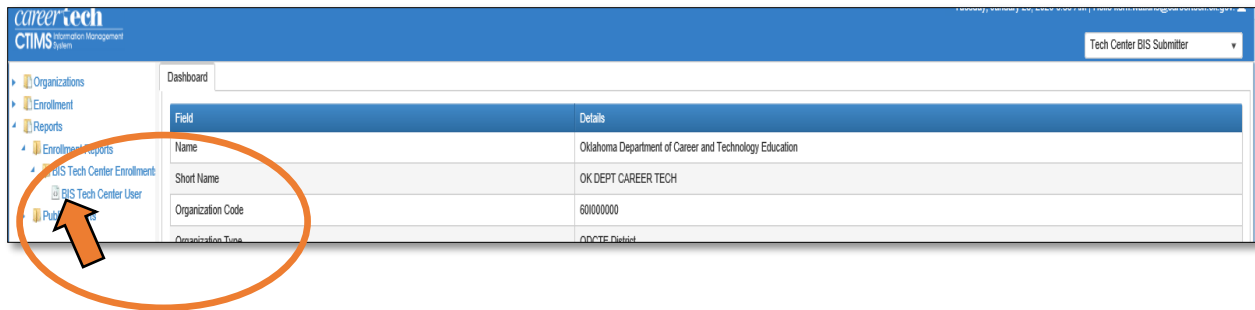
- Click the arrow ► next to **Enrollment Reports** on left navigation.



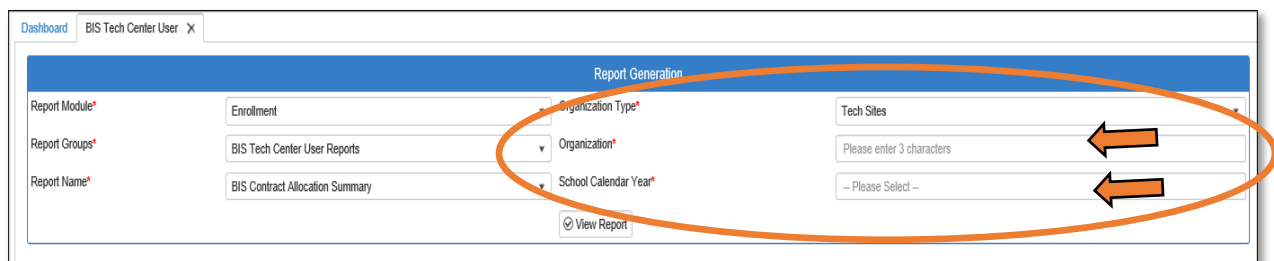
- Click the arrow ► next to **BIS Tech Center Enrollment** on left navigation



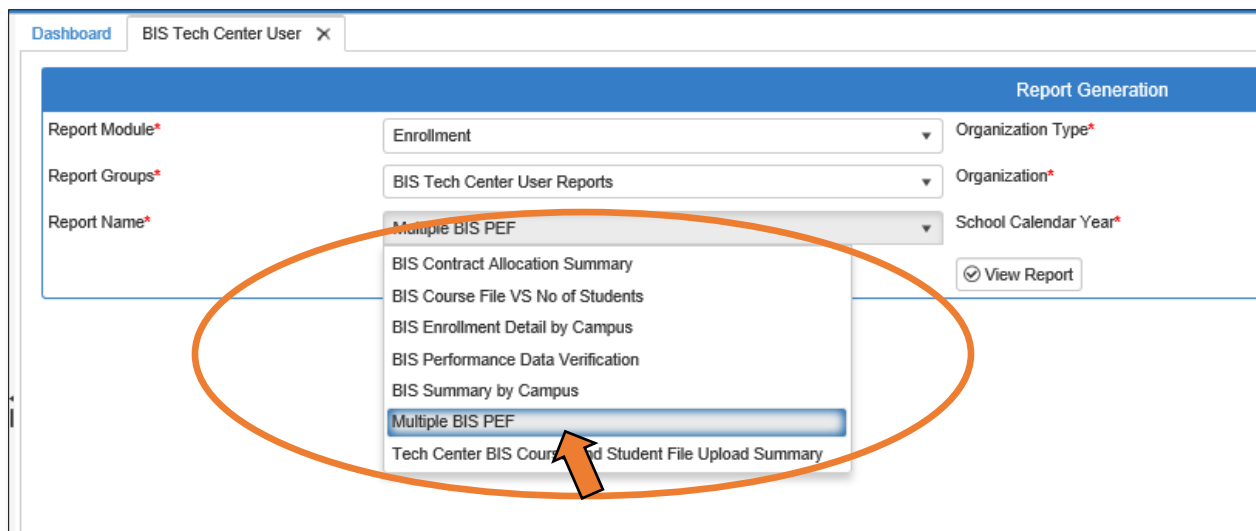
- Select **BIS Tech Center User** on the left navigation.



- On the **Report Generation** screen, in the **Organization** field, type the first three letters of your school name. Then, choose your campus from the drop-down.
- Choose the **School Calendar Year**.



- In the Report Name field, choose the Multiple BIS PEF report from the drop-down.



- Click the **View Report** button.

Report Generation

Report Module* Enrollment Organization Type* Tech Sites

Report Groups* BIS Tech Center User Reports Organization* Please enter 3 characters

Report Name* Multiple BIS PEF School Calendar Year* -- Please Select --

- A list of the PEFs will populate the field below. In the search field in the tan bar above the report, type in the contract number for the PEF you wish to print. Click **Find**.


Sample Technology Center - Campus

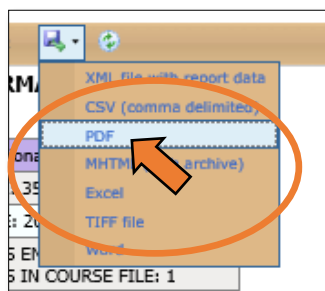
PEF SELECTION

| CONT # | PROG TYPE | COURSE NAME | TEACHER |
|--------------|---------------------|--------------------|----------------|
| H0001 | 75 - Facility Usage | Sample Course Name | Sample Teacher |

- The contract number you are searching for will be highlighted in blue.

| CONT # | PROG TYPE |
|--------------|---------------------|
| H0001 | 75 - Facility Usage |

- Click the highlighted contract number to open the PEF. The PEF will display.
- To print the PEF, click on the save icon  on the tan bar above the PEF and choose PDF from the drop-down to save to your computer and print.



- The PEF will contain the information for the training: contract number, the name of the training, program type, beginning and end date, course hours, number of students enrolled, and the list of students with student details.

Example:

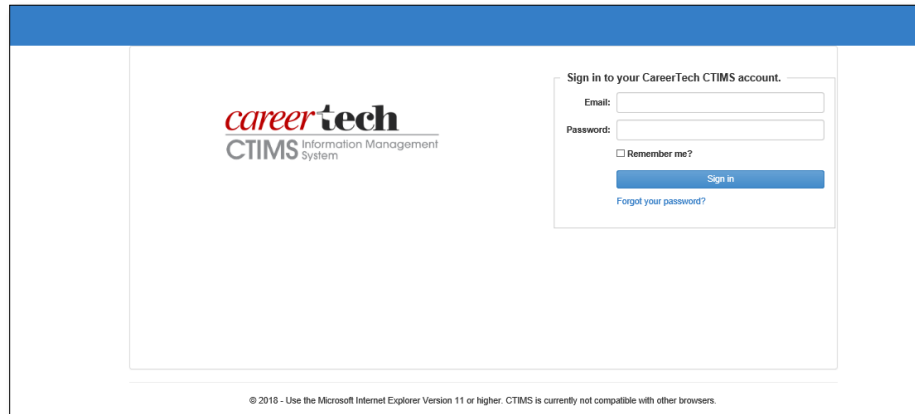
| BIS CONTRACT INFORMATION H0001 | | | | | | |
|-----------------------------------|----------------|--------|--|------|-----------|---------------------|
| Sample Course Name | | | | | | |
| PROG TYPE: 75 | | | MIS CODE: 3501 | | | |
| BEG DATE: 20190926 | | | END DATE: 20190926 | | | |
| COURSE HRS: 2.00 | | | STUDENTS ENROLLED: 1 STUDENTS IN COURSE FILE: 1 | | | |
| FIRST NAME | LAST NAME | GENDER | AGE | RACE | CLOCK HRS | INDUSTRY |
| Sample Student | Sample Student | F | 38 | 09 | 2.00 | Sample Organization |



Business Codes

*career***tech**

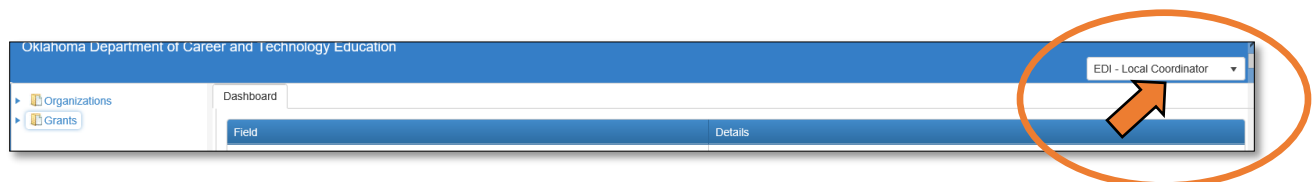
Requesting a New Business Code

- Sign in at <https://ctims.okcareertech.org/CTBDSWeb/> using your school email and CTIMS password.

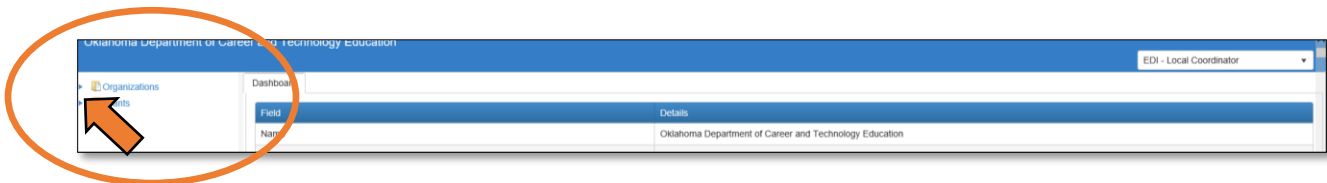


IMPORTANT: Please log into CTIMS using Internet Explorer  version 11 or higher or Microsoft Edge . CTIMS is currently not compatible with other browsers.

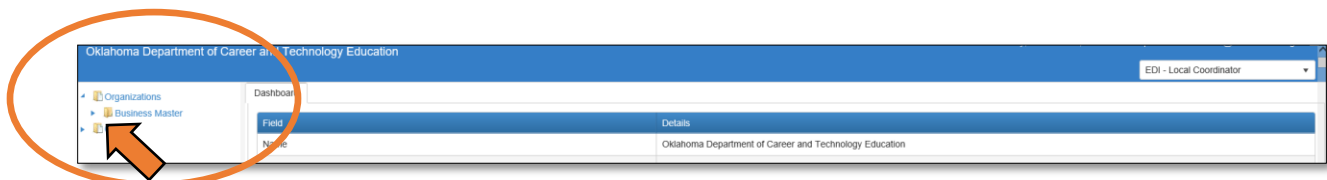
- Verify that you are signed in with the role of an **EDI Local Coordinator** in the top right-hand corner. Use the drop-down arrow to select this role.



- Click the arrow ► next to **Organizations** on left navigation.



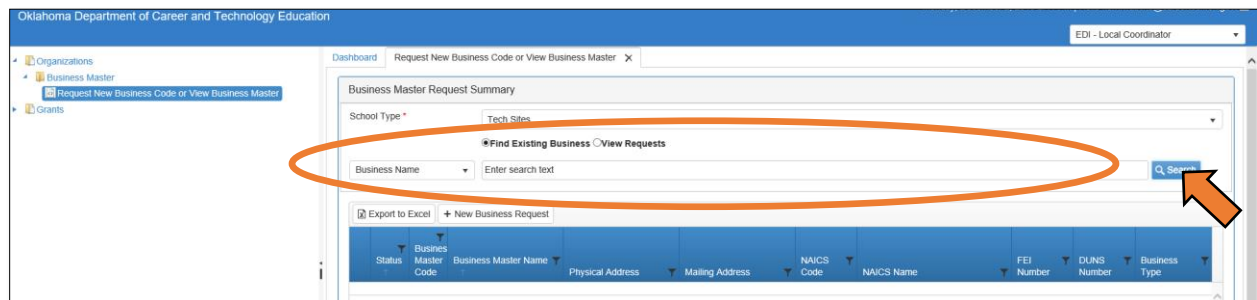
- Click the arrow ► next to **Business Master** on left navigation



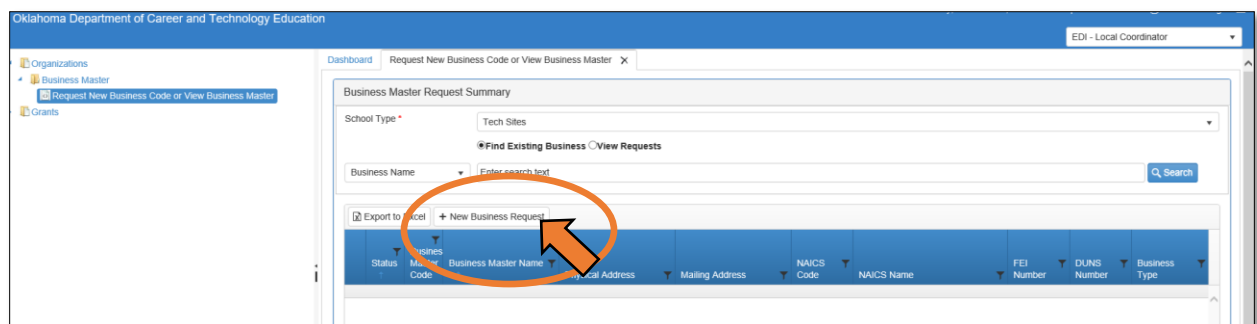
- Select **Request New Business Code or View Business Master**.



NOTE: Search the Business Master before requesting a new business code to verify that the business does not already have a code in CTIMS. To search for an existing business record, in the field next to **Business Name**, type in the name of the business. Then click **Search**. If the business does not populate in the window below, proceed with requesting a new code.



- Click on the **New Business Request** button. You will be directed to a new screen.



- In the box beside **Business Name**, enter the name of the business. The business name must be unique. If the business is a chain, or the name already exists, you will need to add a unique identifier, such as a town name or store number to define it; for example, Shelter Insurance – Joe Smith Agency.
- Click **Save & Next**. You will be directed to a new screen.

Oklahoma Department of Career and Technology Education

Business Master

Dashboard Request New Business Code or View Business Master Business Master

Request New Business Code or View Business Master

Calendar Year* 2017-2018

Organization Type* Business Masters

Business Name* Denise's Business

Reset Back Business Master Summary Save & Next

Enter the following for the new business:

- The **Primary NAICS Code** is a drop down menu where you can select the appropriate NAICS code by clicking on the down arrow and scrolling to select a code. You can also type in the NAICS number or a title keyword in the drop down box (not the gray box on top of the drop down box).
- Enter the **FEI Number** and **DUNS Number**, if applicable.
- If the NAICS code begins with a **92**, you must select the **Business Type** (City Business, County Business, State Business, or Federal Business.)
- Complete the **Physical** and **Mailing** addresses. The Physical address is mandatory. Enter the mailing address if it is different than the physical address. When information is entered in the address fields, a red triangle will appear in the upper left corner of the box. This does not mean there is an error, only that data has been entered in the field.
- To clear the form and start over, click on the **Refresh** button.
- Click **Submit for Approval**. If you are missing any data elements, you will receive an error message when you try to submit. Correct the errors and resubmit.

Dashboard Request New Business Code or View Business Master Business Master

Request New Business Code or View Business Master

Business Code *****

Business Name* Denise Business Test

Primary NAICS Code* (519130) Internet Publishing and Broadcasting and Web Se

(Note: Enter Number or Name)

FEI Number

DUNS Number

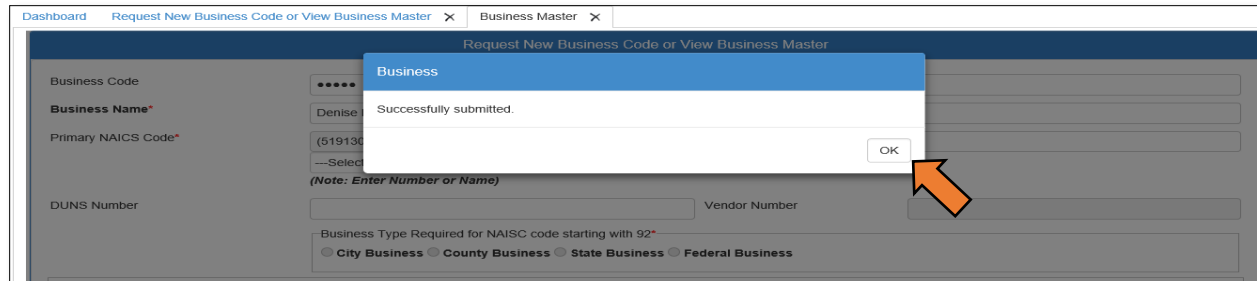
Business Type Required for NAISC code starting with 92*

City Business County Business State Business Federal Business

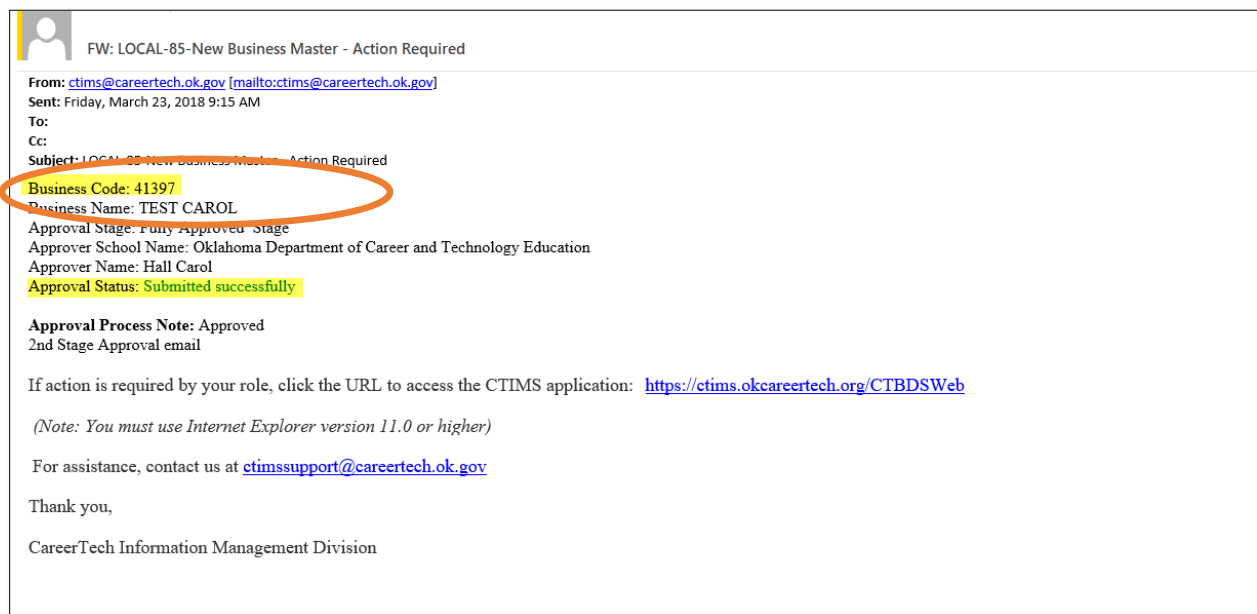
| Type | Street* | City* | State* | Zip* |
|-----------|----------------|------------|----------|------------|
| Physical* | 1500 W 7th Ave | Stillwater | Oklahoma | 74074-4364 |
| Mailing | 1500 w 7th Ave | Stillwater | Oklahoma | 74074-4364 |

Save Changes Submit For Approval Refresh


- You should now see a **Successfully Submitted** message popup. Click the **OK** button. Your request has now been successfully submitted for review. Click on the **X** on the Business Master tab to close this screen.



- You will receive an email from CTIMS@careertech.ok.gov indicating that your request was successfully submitted. No additional action is required from you at this point.
- The Information Management Division staff will review the request. You will receive another email indicating that the request was approved or rejected. See below for examples of these emails. If the request is approved the Business Code will be on the first line of the e-mail.



- If your Business Code request is rejected, you will get an email stating that your Approval Status is rejected. The reason for the rejection will be listed in the **Approval Process Note** in the rejection email. See instructions for the **Change Request** process to make corrections and resubmit your request.

 FW: LOCAL-85-New Business Master - Action Required - Pending

From: ctims@careertech.ok.gov [mailto:ctims@careertech.ok.gov]
Sent: Friday, March 23, 2018 9:14 AM
To:
Cc:
Subject: LOCAL-85-New Business Master - Action Required - Pending

Business Name: Denise Business Request Test #6
Approval Stage: Fully Approved Stage
Approval School Name: Oklahoma Department of Career and Technology Education
Approver Name: Hall Carol
Approval Status: **Rejected**

Approval Process Note: The NAICS code is incorrect.
Action Required Details
Next Stage: Business Submitter
Next Stage User: Denise.Christy@careertech.ok.gov
Approval Status: Pending

2nd Stage Reject email

If action is required by your role, click the URL to access the CTIMS application: <https://ctims.okcareertech.org/CTBDSWeb>
(Note: You must use Internet Explorer version 11.0 or higher)

For assistance, contact us at ctimssupport@careertech.ok.gov

Thank you,
CareerTech Information Management Division

Business Code Change Request

If changes need to be made after submitting a Business Code request, but before it is fully approved, or if your request is rejected, you will need to go through the change request process to make changes.

- Select the **View Requests** radio button. To see only the requests submitted by your site, clear the check mark beside **All Sites**. Type the first 3 letters of your school name in the **School Name(s)** box and select your school. Click on the **Search** button.
- Select the request you wish to change by clicking on the blue **Business Master Name** hyperlink.

Dashboard | Request New Business Code or View Business Master X

Business Master Request Summary

School Type * Tech Sites

☐ Find Existing Business ☒ View Requests

Calendar Year * 2017-2018

School Name(s) Select

☒ All Sites

Enter search text

| Status | Approval Stage | Approved Status | Business Code | Request Business Master Name | Submitted Date | Request Number | Request by Organization Name | Requested |
|--------|----------------|----------------------|---------------|------------------------------|----------------|----------------|------------------------------|-----------|
| + | Ac... | IMD Approver - Fu... | Pending | Denise Test 4 | 02/28/2018 | OBM-BI-41371 | | |
| + | Ac... | IMD Approver - Fu... | Pending | Denise Test 3 | 02/27/2018 | OBM-BI-41370 | | |
| + | Ac... | New-Draft | Pending | Denise Test 2 | 02/27/2018 | OBM-BI-41369 | | |
| + | Ac... | IMD Approver - Fu... | Pending | Denise Business Test | 02/26/2018 | OBM-BI-41368 | | |
| + | Ac... | New-Draft | Pending | Denise's Business | 02/26/2018 | OBM-BI-41367 | | |

- Click the **Change Request** button.

Dashboard Request New Business Code or View Business Master Business Master

Request New Business Code or View Business Master

Business Code:

Business Name*: Denise Business Test

Primary NAICS Code*: (519130) Internet Publishing and Broadcasting and Web Search FEI Number:
--Select--

(Note: Enter Number or Name)

DUNS Number: Vendor Number:

Business Type Required for NAISC code starting with 92*:
☒ City Business ☐ County Business ☐ State Business ☐ Federal Business

| Type | Street* | City* | State* | Zip* |
|-----------|-----------------|------------|----------|-------|
| Physical* | 1500 W. 7th Ave | Stillwater | Oklahoma | 74074 |
| Mailing | 1500 W. 7th Ave | Stillwater | Oklahoma | 74074 |

Save Changes Change Request Submit for Approval Refresh

- You will get a popup indicating you are going to cancel the approval process and initiate the change request process. Click **OK**.

Change Request

You are going to cancel the approval process and initiating the change request process, Are you sure?

Cancel OK

- Make the necessary changes to your request. Click **Submit for Approval**.

Business Code: *****

Business Name*: Denise Business Request Test #6

Primary NAICS Code*: (811430) Footwear and Leather Goods Repair
FEI Number:
---Select---

(Note: Enter Number or Name)

DUNS Number:

Vendor Number:

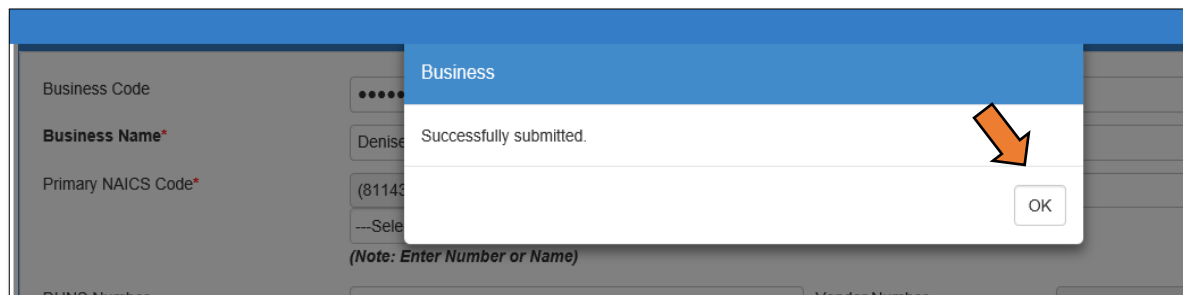
Business Type Required for NAISC code starting with 92*:
☐ City Business ☐ County Business ☐ State Business ☐ Federal Business

NOTE: The business you are requesting must have employees that will be attending courses at your school and must have operations in Oklahoma with an Oklahoma address. The only exception would be for Volunteer Fire Departments.

| Type | Street* | City* | State* | Zip* |
|-----------|-----------------|------------|----------|-------|
| Physical* | 1500 W. 7th Ave | Stillwater | Oklahoma | 74074 |
| Mailing | | | | |

Buttons: Save Changes, Submit For Approval, Refresh

- Click **OK**.



- Click on the **Approve** button if you are ready to finalize your changes.

Approval Process - New Business Master Approval

NOTE: Enter Approval/Rejection Note and then Click on Approval button to finalize your changes and submission to further Process.

Click on Approval button to finalize your changes and submission to ODCTE.

Request Number
OBM-BI-41398

| Approval Stage | Approval Date | Approver Role | Approved By | Approver Email | Approval Status | Note | Private Note |
|-----------------------------------|---------------------|----------------|------------------|------------------|-----------------|------------------------|--------------|
| Business Submitter - 1st Stage | 3/26/2018 2:08:0... | Tech Center... | Denise - Chri... | Denise.Christ... | Cancel for C... | Change Request Process | |
| IMD Approver - Fully Approved ... | 3/26/2018 2:12:3... | | | | | | |

Current Approval Stage Information

Approved By* Christy Denise Approval Stage* 1st Stage

Approver School* Oklahoma Department of Career and Technology Education Approver Role* Tech Center BIS Submitter

Approver Email* Denise.Christy@careertech.ok.gov Approval Date* 03/26/2018

Approval/Rejection Note

Format B I U [List Icons]

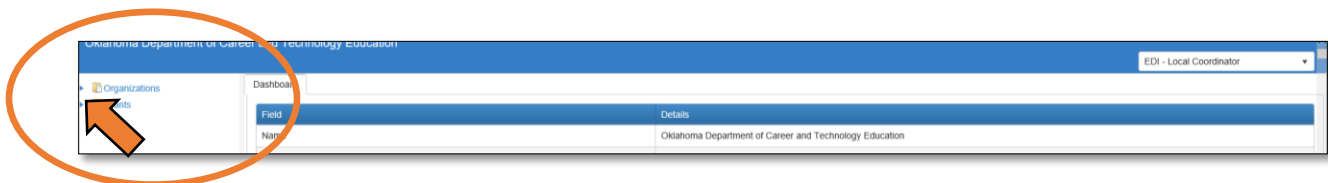
Private Note

Format B I U [List Icons]

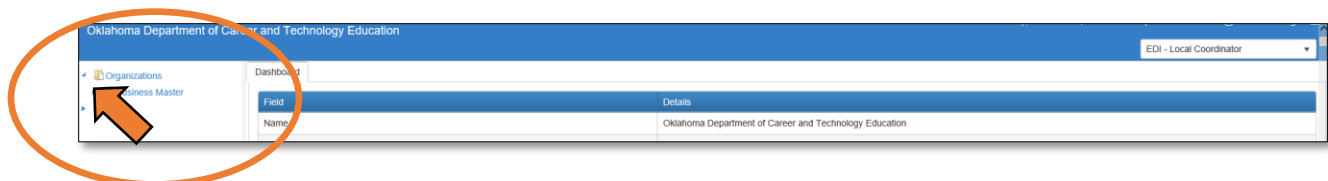
Active Status of a Business Code

A business code may exist in CTIMS, but it is no longer active.

- Click the arrow |▶ next to **Organizations** on left navigation.



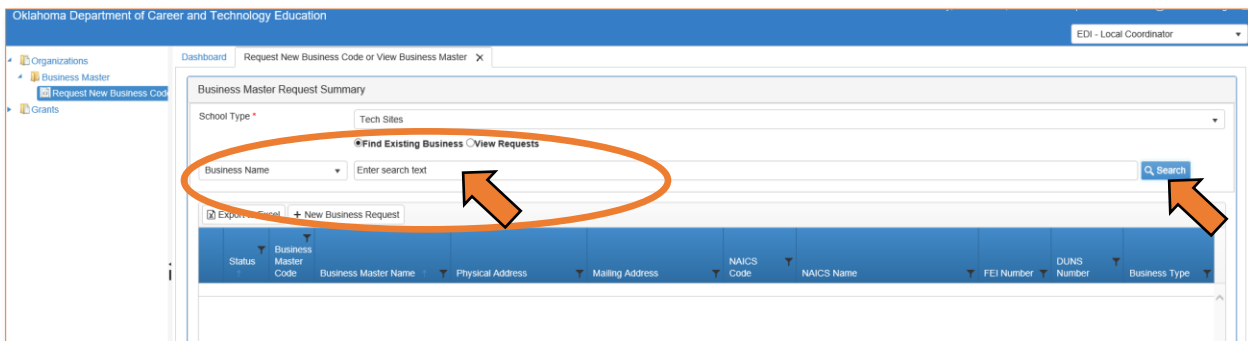
- Click the arrow |▶ next to **Business Master** on left navigation



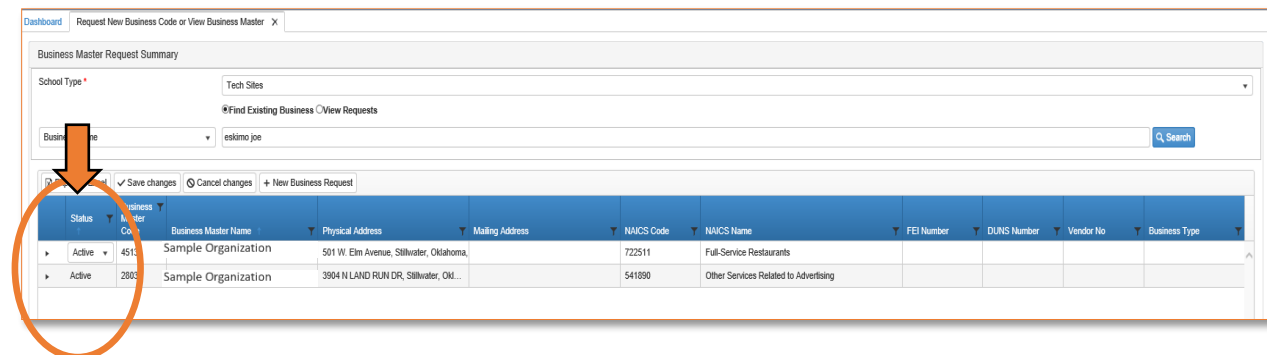
- Select **Request New Business Code or View Business Master**.



- In the field for **Business Name**, type in the name of the business, then click the **Search** button.



- In the status column, check the status of the code; active or inactive.



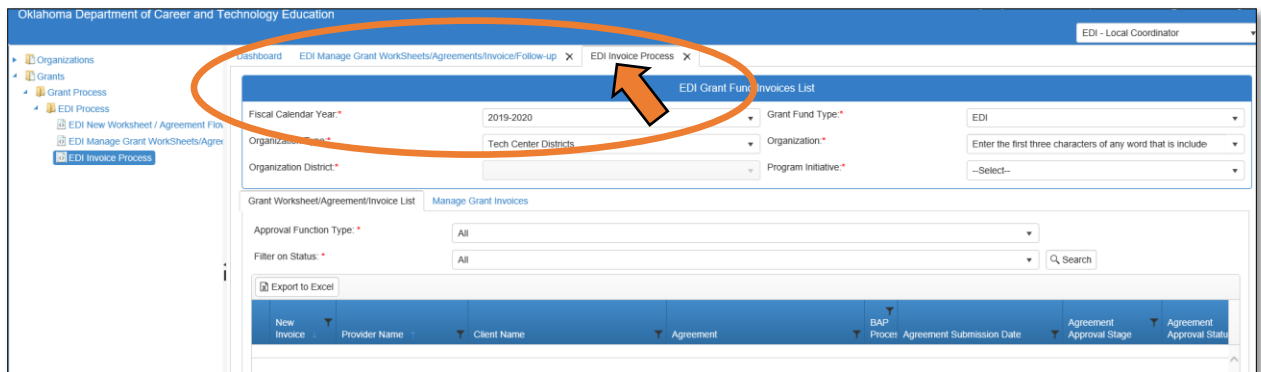
NOTE: To activate an inactive code, contact CTIMS support at CTIMSSupport@careertech.ok.gov.



CTIMS Helpful Hints

*career***tech**

CTIMS Helpful Hints

- There are scroll bars located at the bottom and right of some of the screens in CTIMS. If you cannot see all of the information on a screen, go to the right or bottom of the screen and use the scroll bar to see navigate over to view additional columns and rows.
- You can flip between screens or tabs in CTIMS. Click on any open tab at the top of your screen to toggle between them.



- There are tabs within screens in CTIMS. Look for these tabs to view a different screen or more information. For example, within the Invoice Process, on the EDI Grand Fund Invoices List screen, there are two tabs: Grant Worksheet/Agreement/Invoice List and Manage Grant Invoices. You can flip between the two tabs within this screen.
- Many sections in CTIMS can be expanded in order to view more detailed information by clicking on the +(plus) sign or an arrow ► next to the section header or line (row).
- Hold down the Ctrl key and click on the + or – keys to zoom in or out.
- Do not use the Print icon  to print documentation. Use the save icon  to download a pdf, then you can save it to your computer or print the pdf.
- You can only have 10 tabs open at one time. To close tabs, click on the ✕ on the right side of the tab you wish to close, then confirm that you would like to close by clicking OK on the confirmation screen.

Where's my Worksheet, Agreement or Invoice?

To find out what approval stage your worksheet, agreement or invoice is in, you can take the following steps:

Worksheets/Agreements

- On the navigation on the left, go to Grants>Grant Process>EDI Process>then click on EDI Manage Grant WorkSheets/Agreements/Invoice/Follow-up.
- Complete the EDI Grant Fund Worksheets List form and click Search.
- The list of worksheets/agreements will populate. In the Agreement Approval Current State column you can see at which stage the worksheet/agreement is currently in.
- You can also click on the ► on the left, on the worksheet row to view the worksheet and agreement summaries. This includes approval/rejection notes for each approval stage.

NOTE: If the worksheet is still in the New Draft stage, the approval summary will be blank.

Invoices

- On the navigation on the left, go to Grants>Grant Process>EDI Process>then click on EDI Invoice Process.
- Complete the EDI Grant Fund Invoices List form and click Search.
- There are 2 tabs: Grant Worksheet/Agreement/Invoice List and Manage Grant Invoices. Click on the Manage Grant Invoices tab.
- You can use the scroll bar at the bottom to scroll to the right to see the Current Approval Stage column.
- Or you can click on the ► on the left, on the invoice row to view the Invoice Approval Summary. This includes approval/rejection notes.

Where are the Funds?

- If you have created a new invoice and added a dollar amount to a line item, that amount will be subtracted from your balance on the dashboard. This includes a draft of an invoice that has not been submitted for approval.
- If \$0.00 are available in a line item to invoice, the line item will not appear on a new invoice.

Releasing Unused Funds

If a project has completed and not all funds are used, you can release the funds to be used for another project.

Releasing Funds to be used for the Same Program Type

For example, you can release funds for a fire fighter program to be used for another fire fighter program training project.

- In the Agreement, you will do a budget adjustment. Once the budget adjustment is fully approved, the funds will be released and you can begin a new Worksheet for the new training. Click [here](#) for guidelines on the budget adjustment process.

If you have a line item that has not been used and need to release the funds to be used for another project, you will make that line item inactive:

- To make a budget line item inactive, click inside the field under the **Status** column to check the box.
- Check the box, then **Save as Draft**.
- Make sure the line is inactive, then click **Submit for Approval**.

Budget Line Items

Grant Allocation: Sub Award Allocation \$63,038.00 Worksheet Budgeted \$25,682.51 Worksheet Requested Total \$25,682.51 Agreement Budgeted \$11,014.21 Fully Approved Invoiced \$0.00 Agreement Unbudgeted = (Allocated - Agmt. Budgeted) \$52,023.79 Remaining to Invoice \$11,014.21

+ Add Budget Line -X Remove Budget Line -C Cancel Budget Line Changes

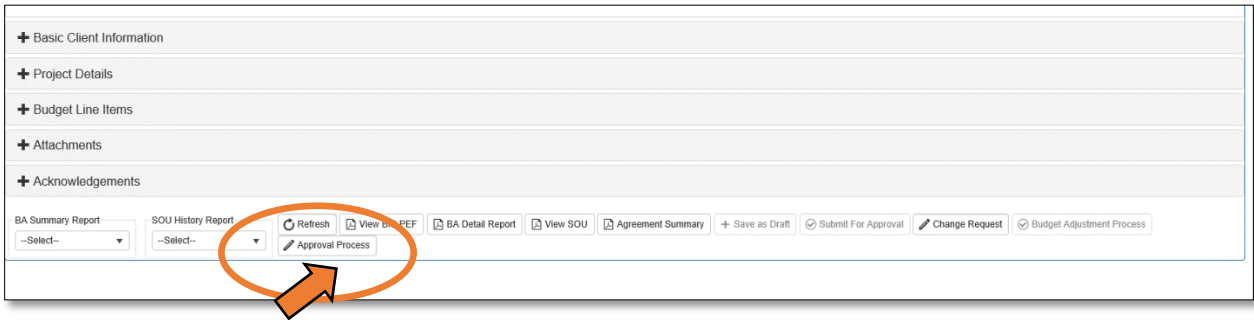
| Budget Line Desc. | Req. Units | Req. Unit Cost | Req. Unit Type | Work Sheet Total | Req. Total | Matched Funds | Status |
|---------------------------------|------------|----------------|------------------|------------------|-------------|---------------|--------|
| UT/VATV SAFETY CLASS | 1.00 | \$150.00 | Cost Per Class | \$150.00 | \$150.00 | 0.00 | Active |
| ECSI CPR/FIRST-AID/IED CLASS | 5.00 | \$180.00 | Cost Per Class | \$900.00 | \$900.00 | 0.00 | Active |
| ADVANCED PUMPER CLASS | 1.00 | \$6,500.00 | Cost Per Class | \$6,500.00 | \$6,500.00 | 0.00 | Active |
| FLAMMABLE LIQUID AND GASS CLASS | 1.00 | \$4,400.00 | Cost Per Student | \$4,400.00 | \$4,400.00 | 0.00 | Active |
| | | | | \$11,950.00 | \$11,950.00 | | |

Note: Maximum 1000 characters length

+ Attachments
+ Acknowledgements

Refresh Worksheet Summary One Step Back Save as Draft Submit for Approval

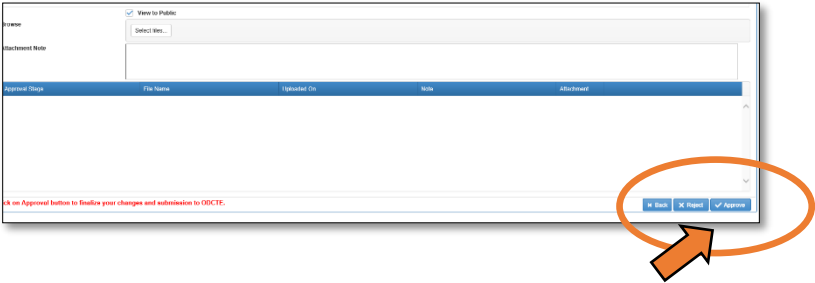
- Go back into the Agreement and click **Approval Process**.



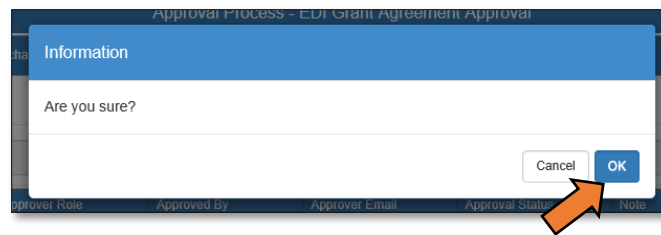
- Add the approval note in the Note field.

A screenshot of the 'Approval/Rejection Note' form. At the top is a 'Format' dropdown and a rich text editor toolbar. Below this is a large text area for the note. A yellow box with a black border contains the text: 'Add note here. If you do not have a note to add, type your initials. This field is required.' An orange arrow points from this box to the text area. Below the main note field is a 'Private Note' section with its own toolbar and text area. Further down is a 'Browse' section with a 'View to Public' checkbox and a 'Select files...' button. At the bottom is an 'Attachment Note' section. A table at the very bottom has columns for 'Approval Stage', 'File Name', 'Uploaded On', 'Note', and 'Attachment', with a 'Top' button on the right.

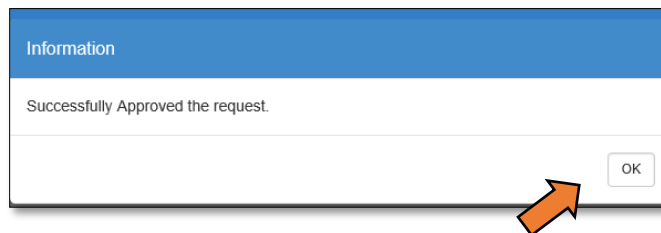
- Add private note (optional).
- Click **Approve**.



- On the pop-up screen, click **OK**.



- Verify the submission by clicking **OK**.



The request has been successfully submitted and will go to the **EDI Local BIS Director**.